TN Department of Education

Technical Application Guide

Consolidated Funding Application Guide for FY22

Tennessee Department of Education | March 2021

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Introduction

The Consolidated Funding Application (CFA) must be completed by each local educational agency (LEA). It includes funding awards for the following federal programs:

- Title I, Part A
    - Title I, Part A—Neglected
- Title I, Part C—Migrant
- Title I, Part D—LEA
- Title I, Part D—State Agencies
- Title II, Part A
- Title III, Part A
- Title IV, Part A
- Title V, Part B, Subpart 2 (Rural and Low-Income Schools)
- IDEA (Part B, Section 611 and Section 619)

The CFA must be reviewed and approved by the state education agency (SEA), the Tennessee Department of Education (the department).

The CFA is embedded in the department's online grants management system, ePlan (https://eplan.tn.gov). LEAs use ePlan to access state Basic Education Program (BEP) and federal funds (formula and competitive), access required LEA and school plans, upload compliance documents, and submit funding reimbursement requests.

This guide provides ePlan users with instructions and best practices for the accurate completion of the required CFA to ensure the availability of funds by July 1, 2021

For a highlight of the changes to the CFA since FY21, please see the *Changes to the FY22 CFA* resource.

ePlan User Access

All users must have the correct ePlan LEA-level user access permission to access and complete the CFA. Users with existing ePlan access can check who in the LEA is assigned each user access role in ePlan by navigating to the **Address Book**, then **LEA Role Contacts**, and viewing who is listed with each user access role.

New ePlan users and existing ePlan users who need additional user access roles must request those roles using the _ePlan User Access Form for LEAs_, available in in ePlan in **TDOE Resources** in the folder titled _User Access Forms_. **TDOE Resources** is accessible without logging into ePlan. Email completed forms to ePlan.Help@tn.gov and allow two business days for the request to be processed.

Below are the roles, functions, and the order of the status levels specific to the CFA process.

ePlan Role	ePlan Function
LEA Consolidated Director (ESEA Director, IDEA Director) **LEA Fiscal Representative** **LEA Authorized Representative**	Change the application status by clicking **Draft Started** (or **Revision Started** for revisions) Respond to application questions, enter budgets
LEA Consolidated Update (Other LEA Project Directors)	Respond to application questions and enter budgets
LEA Consolidated Director	Click **Draft Completed** (or **Revision Completed** for revisions)
LEA Fiscal Representative (CFO or Treasurer)	Click **LEA Fiscal Representative Approved** (or **LEA Fiscal Representative Not Approved**) (also may request funds after CFA is approved)
FPO Divisional Coordinator	Click **FPO Divisional Coordinator Reviewed** (or **FPO Divisional Coordinator Returned—Revisions Needed**)
FPO Leadership (FPO & OCFO Project Directors)	Click **FPO Leadership Approved** (or **FPO Leadership Not Approved**)
LEA Authorized Representative (Director of Schools)	Click **LEA Authorized Representative Approved** (or **LEA Authorized Representative Not Approved**)

After each status change, ePlan automatically sends a notification email to all users in the LEA who have the ePlan role of the next step in the process. For example, after the _LEA Consolidated Director_ clicks _Draft Completed_, ePlan automatically sends an email to all users in the LEA who have the role of _LEA Fiscal Representative_. Once the LEA receives the notification email that the CFA status has been changed to _FPO Leadership Approved_, LEAs must complete the last step, _LEA Authorized Representative Approved_, for allocations to become available for reimbursement.

How to Access the CFA from the ePlan Homepage

To navigate to the CFA from the ePlan homepage, move the mouse over the **Funding** tab on the left menu bar and select **Funding** then **Funding Applications**.
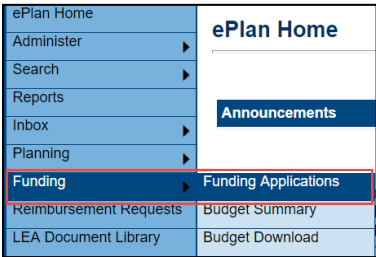

Select the desired fiscal year in the upper left corner of the screen. Funding applications are stored in ePlan according to the *state* fiscal year. For example, "2022" indicates the "2021–22" school year.

The CFA is the first application listed. Click **Consolidated** to access the application.
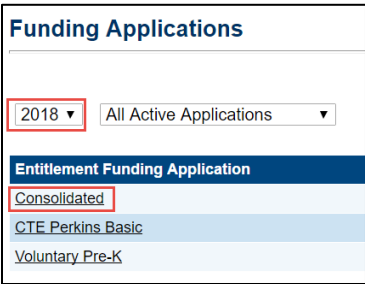
The CFA is not visible to LEAs for a new funding year until the department loads allocations. LEAs can typically view the application prior to the CFA application period beginning on March 1.

The department changes the application into the **Not Started** status on March 1. To begin the application the appropriate user must change the application status to **Draft Started**. In this status, users with the following access may edit the application: (1) *LEA Consolidated Director*, (2) *LEA Fiscal Representative*, and (3) *LEA Authorized Representative*.
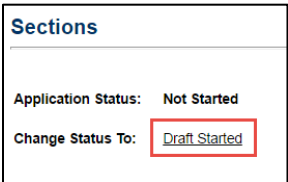
The Sections Page and General ePlan Functionality

How to Access Each Page of the CFA

Use the _Sections_ page, to access each section and page of the CFA. View this page in its entirety or in a condensed view where only the main section categories are visible. For easy navigation, users may return to the _Sections_ page by going to the **Funding** tab on the ePlan blue menu bar and selecting _Sections_.

Users can only see the grant applications and sections where an allocation exists for the LEA. For example, if an LEA does not receive Title III, Part A funding, the Title III, Part A page is not visible to that LEA.

From the section Page, users can access each page of the application. Pages include a variety of input fields for providing information.

- **Check boxes** are boxes that allow the user to indicate whether something applies to LEA. On some pages, checkboxes mark other fields as not-applicable so that users are no longer required to respond.
- **Drop-down boxes** allow users to select from a preprogrammed drop-down list of possible answers.
- **Radio buttons** are small circular input fields that allow users to select one option out of a list of options.
- **Narrative boxes** are boxes that allow formatting, including bolding, numbering, and font manipulation. Paste information such as text, tables, pictures, and graphs into narrative boxes.
- **Text boxes** are designed for more concise responses and do not allow as much formatting flexibility.
    NOTE: _Some text boxes have character limits. It is still possible to paste text into a text box; however, the text may not hold its original formatting._
- **Tables** provide structured entry for multiple pieces of related information. They may include a combination of other input fields and may have the Add Row option, where users can increase the size of the table to enter additional information. Where the trash can icon appears on additional rows, users can delete unneeded rows.
- **Plus and Minus symbols** allow the user to show or hide additional questions on the page.

How to Print in ePlan

Users may print or download a PDF from the _Sections_ page.

- To print the entire application, click the **Print** link across from the word "_All_" at the top of the _Sections_ page. **NOTE:** _Print requests do not include any uploaded related documents._
- To print a single page, click on the **Print** link across from the name of the page.
- To print an entire section, click on the **Print** link to the far right of the section name. In the example shown, the user is printing the entire **ESEA Requirements** section.
- To choose multiple pages, check the **Print Select Items** box at the top of the print column to select more than one page. The **Print** links appear as checkboxes. Select all text boxes for the desired print request.

- Select the checkboxes and click **Print** at the top of the column.
- The **Print Request** screen pops up. Users may rename their print job here.
- Click **Print**.
- The **Generating Document** screen appears. The system takes 20–30 seconds to generate small print documents. For larger files, expect an email from the ePlan system when the file is ready to download.
- After ePlan generates the print file, click **Return to Funding Applications**.

The PDF generated by ePlan appears at the top of the page from the **TDOE Resources** menu item. The PDF link remains in **TDOE Resources** for five (5) days. Users may use the "*Delete*" links to remove any print jobs.

TDOE Resources

Below is your list of Print Requests.

Print Request Name	Request Date	Expiration Date	
My LEA Contacts Page	4/23/2020 2:28:48 PM	4/28/2020 2:28:48 PM	Delete

How to Resolve Validation Warnings and Errors and Submit the CFA

- To submit the CFA when the CFA is complete, click the **Messages** link on the _Sections_ page in the column labeled "Validation." This link provides an overview of the background validations that ePlan runs.

Description (View Sections Only View All Pages)	Validation	Print ☐ Select Items
All	Messages	Print
− Cover Page		Print
Cover Page		Print

- Items marked "**Warning**" are validations that users are not required to address prior to submitting the CFA. Examples of warnings are not uploading an optional related document or budgeting an entire allocation.

Related Documents	
The optional Related Document 'Private Schools Consultation (CFA)' has not been uploaded. Please be certain this is the intention.	Warning

Items marked "**Error**" are incorrect and users must address each one before submitting the CFA.
- Click on the link to the left of the word "*Error*" to go to the identified page to make corrections. If the LEA does not address all "*Error*" validations, ePlan does not allow users to submit the CFA.

Examples of errors are (1) budgeting for more than the allocation, (2) budgeting more indirect cost than is allowable, (3) not budgeting in a section where there is an allocation, (4) not uploading a required related document, or (5) not responding to a required question.
- Once the user clears all errors, the user assigned the "*LEA Consolidated Director*" access role must click **Draft Completed** at the top of the _Sections_ page.
- This generates an email to the _LEA Fiscal Representative_ who must review the draft and click **LEA Fiscal Representative Approved** (or **Not Approved**) at the top of the _Sections_ page.

Applications submitted in the status of **"LEA Fiscal Representative Approved**" are sent to the LEA's FPO Divisional Coordinator for review. A map listing current FPO Divisional Coordinators is available in the **TDOE Resources** page in ePlan.

Revisions to the CFA

After the CFA is approved by the department, the LEA may revise the application to amend one or more budget or program items.
- To begin a revision, users assigned the role of _LEA Consolidated Director_, _LEA Fiscal Representative,_ or _LEA Authorized Representative_ may click **Revision Started** at the top of the _Sections_ page.

Application Status:	LEA Authorized Representative Approved
Change Status To:	Revision Started
	or
	FER Draft Started

When the CFA is in **Revision Started** status users may make edits to all programs in the CFA as needed.

The application process flows in the same manner as the original submission. Until full approval, budget changes do not move into the reimbursement screens.

- On the _Sections_ page, in the **Revision** column, users may view any changes made to the application as part of a revision by clicking the generated **Details** link.

To view the original application or a prior revision, from the dropdown menu on the **Funding Application** screen, choose the menu item for _All Approved Applications_. The page then displays all formerly approved revisions. **NOTE:** _If there is a current application in progress (not approved), it does not appear in the All Approved Applications list. After reviewing prior revisions, remember to return the dropdown selection to_ **All Active Applications**.

Non-Program-Specific Pages in the CFA

Consolidated Checklist

On the *Consolidated Checklist* Page, each section of the application reflects one of these statuses:
- **Not Reviewed**: No review occurred.
- **OK**: The section has no needed corrections and is approvable.
- **Coordinator Reviewed**: The section has been reviewed by the coordinator.
- **Attention Needed**: The section has items that must be corrected.

After the CFA has been reviewed and returned to the LEA, LEAs must review the *Consolidated Checklist* page for general checklist comments from each application reviewer, if applicable, and for each ESEA and IDEA program section.
- After the LEA submits the application, the department reviews the application and marks each section as *OK, Not Applicable*, or *Attention Needed*. If the application contains no items that are marked as Attention Needed, the application is approvable.
- If the application contains items that are marked as *Attention Needed*, the application is returned to the LEA with a status of *Not Approved*. The LEA must review the checklist for items that are marked *Attention Needed* and make the necessary changes to those items. Only the checked items in the sections marked *Attention Needed* need correction. Each section marked *Attention Needed* has a place where the department may provide notes to explain items needing attention. Users must check for notes and additional comments in this area.
- Once the LEA has made the necessary adjustments, the LEA resubmits the application for approval. If the department determines that the section is now correct, FPO Leadership will change *Attention Needed* to *OK*. If the items needing attention still have not been corrected, the application will be returned to the LEA with a status of *Not Approved*.
- Once the application contains no items that are marked *Attention Needed,* FPO Leadership changes the application status to **TDOE FPO Director Approved.**

Cover Page

LEA users must enter the following information:
- The LEA ID number and LEA name
- The LEA official address, phone number, and LEA website address
- LEA Assessment Information URL (required per T.C.A. § 49-6-6007; *The information shall include the name of the test, the purpose and use of the test, the grade or class in which the test is to be administered, the tentative date or dates on which the test will be administered and how and when parents and students will be informed of the results of the test.*)
- Name and contact information for the director of schools, ESEA director, and IDEA director

If any information on this page changes within the school year, An LEA user must update this page.

- Review and check the assurance at the bottom of the page that indicates that all information entered is accurate as of the date of the submission of the CFA.

The **Cover Page** shows the obligation period of the grant. For FY22, the obligation period is July 1, 2021, through Sept. 30, 2022. The Tydings Amendment provides an additional 12 months of carryover. This period of availability includes the initial period authorized by the appropriations act and an additional 12 months authorized by the General Education Provisions Act § 421(b) (the "Tydings Amendment").

History Log

The *History Log* documents status changes, the name of the user who prompted the change, and the date of the change. Use the History Log to review who submitted or reviewed an application or the date when it was last approved or returned.

- Users may place a note in the *History Log* by clicking on the **Create Comment** link. Use **Create Comment** with caution, as comments remain part of the application's permanent record and are viewable on the publicly-viewable approved applications.
- To create a comment, click on **Create Comment**. A narrative box appears. The user may type or paste a comment in the narrative box. Once the comment is complete, click **Save and Go To-Current Page** at the top of the screen to save.

Allocations

Amounts on the *"Original"* line for each grant must match the most recent approved allocation listing provided by the office of local finance. Should the U.S. Department of Education (ED) revise allocations, this amount adjusts to reflect updated allocation amounts.

	(1) Title I-A CFDA: 84.010A	(2) Title I-A Neglected CFDA: 84.010A	(3) Title I-C	(4)	~ III iA	(8) Title IV CFDA: 84.424A	(9) Title V CFDA: 84.358A	(10) ESEA Con. Admin
From Title I-A	$0.00							$0.00
From Title I-A Neglected		$0.00						$0.00
From Title I-C			$0.00					$0.00
From Title I-D LEA								$0.00
From Title I-D SA								
From Title II-A	Original $0.00 Carryover $0.00				Original $0.00 Carryover $0.00		Original $0.00 Carryover $0.00	$0.00
From Title III					0.00			$0.00
From Title IV	Original $0.00 Carryover $0.00				$0.00 $0.00	$0.00	Original $0.00 Carryover $0.00	$0.00
From Title V							$0.00	$0.00

- Enter amounts, if any, in the ESEA Con. Admin column to transfer to consolidated administration (con admin), out of all eligible grants. ***NOTE:*** *Users must include funds necessary for the administration of both public and non-public programs in the amounts entered.*

- Users must ensure that amounts transferred into con admin do not exceed maximums.

- Users must calculate percentages on the current fiscal year allocation award, include amounts transferred out, and **exclude** carryover funds.
  - Title I, Part A; Title I, Part A—Neglected; Title I, Part C ; Title I, Part D; Title II, Part A; and Title V, Part B, Subpart 2 cannot exceed 20 percent according to the department.

- o Title III, Part A; and Title IV, Part A cannot exceed two percent. (The administrative percentage calculates based on direct administrative costs only—indirect costs are not included in the calculation.)
- o All ESEA programs administered with con admin funds **must** contribute a minimum of $100 to the con admin pool according to the department.
- o All expenditures related to the administration of ESEA programs included in the con admin pool **must** be budgeted in the con admin budget. No additional administrative costs may be budgeted in the individual program budgets.

Amounts entered for con admin must include the amount needed for non-public administration. LEAs must decide the amount as part of the required non-public consultation process. Based on amounts entered for each program contributing to con admin, ePlan auto-calculates a percentage and populates the administrative percentage in Table I on the _ESEA Administration_ page.

LEAs that exercise the transferability options within ESEA must indicate the amounts of money to transfer on the *Allocations* page.

	(1) Title I-A CFDA: 84.010A	(2) Title I-A Neglected CFDA: 84.010A	(3) Title I-D LEA CFDA: 84.010A	(4) Title I-D SA CFDA: 84.013A	(5) Title II-A CFDA: 84.367A	(6) Title III CFDA: 84.365A	(7) Title IV CFDA: 84.424A	(8) Title V CFDA: 84.358A
From Title I-A	0.00							
From Title I-A Neglected		0.00						
From Title I-D LEA			0.00					
From Title I-D SA				0.00				
From Title II-A	0.00					0.00		0.00
From Title III						0.00		
From Title IV	0.00		0.00	0.00	0.00	0.00	0.00	0.00
From Title V								0.00

LEAs may transfer funds allocated under Title II, Part A and Title IV, Part A grants. No other grant programs allow the transfer of funds.

Consultation with non-public schools is required *before* the transfer if a transfer affects students or educational personnel from non-public schools.

Eligible grant funds can only be transferred into specific grant programs
- Title II, Part A funds may be transferred to Title I, Part A and Title V, Part B, Subpart 2
- Title IV, Part A funds may be transferred to Title I, Part A; Title I, Part D; Title II, Part A; Title III, Part A; and Title V, Part B, Subpart 2 [ESEA § 5103].

When transferring funds, LEAs have the option to transfer only a portion of funds allocated or may transfer the entire allocation. Funds transferred into other grant programs take on the identity of the receiving grants and are subject to the fiscal requirements of the receiving grants. Funds transferred into Title I, Part A must be included in required set aside calculations.
- For example, LEAs that transfer funds into Title I, Part A are required to include the funds transferred when determining the one percent parent and family engagement set aside and non-public equitable services set aside.

Contacts

LEAs must choose contacts for multiple positions within the LEA and indicate years of experience in the role in Tennessee for each contact. To choose a contact, click on the arrow to the right of the dropdown menu. The names of ePlan users in the LEA populate this dropdown box. To identify a person as a contact in the CFA, that person must be an ePlan user.

- If the same person holds several positions, list them for each position held.
- LEAs may name more than one contact for any of the 20 positions; however, the first name in the list is the "primary" contact for each position if a single point of contact is necessary.
  - o ESSA requires that states publish a list of McKinney-Vento liaisons. The person listed in ePlan as the homeless liaison is on the official state list, published on the [department website](#).

If any of these contacts change throughout the school year, anyone assigned the LEA Consolidated Update or LEA Consolidated Director roles may update the page. If the application is in an editable status (i.e., **Draft Started**, **Revision Started,** or any of the statuses indicate that the application is in a status of **Returned Not Approved**), the *user* may make the change immediately. If the application is not in one of these statuses, the **user** must begin a revision to change contact information.

- To begin a revision, click **Revision Started** at the top of the <u>*Sections*</u> page. Make the change, and then process the application through the same status progression as an original submission.

The changes to this page do not appear in the LEA's ePlan *Address Book* until approval of the application or revision is occurs; however, department project directors have access to contact changes the moment the change occurs in the CFA.

The names, phone numbers, and email address information that follows each contact is pre-populated from each individual's user profile. User details, including phone number and email address, are added to each ePlan user's profile using the information submitted on the *ePlan User Access Form*. Users who do not connect to ePlan via Single Sign On (SSO) may change their own profile information in ePlan by clicking on their name (active hyperlink) located below the ePlan sign-in menu item. However, users who connect via SSO cannot update profile details. Contact DT.Support@tn.gov to update SSO accounts.

Program Specific Information in the CFA

Budget

The process for entering budgets is consistent across all grants within the CFA. Users must complete each grant budget separately (e.g., Title I; Title II, Part A; IDEA, etc.). Each LEA must have a department-approved budget in ePlan before requesting reimbursement.

- To access a budget, click the _Budget_ page link from the _Sections_ page.

Copying Last Year's Budget Detail

Users may choose to copy last year's budget line items and narrative descriptions into the current year's application. Once copied, LEAs only need to make changes where dollar amounts and narratives have changed since the previous year. For some grants, users may copy budgets by grant (but not all grants have this option).

The decision to copy a previous year's budget must be made _before_ entering the current year's budget information. _If a user makes a single budget entry, the link to copy budget details becomes unavailable._

- To copy last year's budget, click **Copy 2021 Budget Detail**. Click the verification link **Copy**.

Upload Budget Data and Download Budget Data

New the FY22 CFA, the Budget Upload/Download function on the budget page allows users to download budget files as spreadsheets and then create, edit, or delete the contained budget detail data in the spreadsheet file before uploading it back into ePlan. This allows users to do the following:

- See large numbers of budget details at one time,
- Create custom reports from budget details using the Excel functions,
- Ask individuals without ePlan access to contribute to application budgets, which the LEA user with CFA access can upload directly into the Application, and
- Print the budget as an Excel file, with filtered data, such as budget details for a specific school.

Any user who can view the budget page of the application can use the download budget function, including the public in the case of approved applications. Only users with the user role access that allows changes to the budget page may upload a file into the application. Uploads, like other budget changes, can only occur when the funding application is in an editable status (such as _Draft_ or _Revision Started_, or _Returned Not Approved_. The link is unavailable when the application is in a non-editable status.

For detailed instructions about using the _Upload Budget Data_ feature please see: the _Upload Budget Data and Download Budget Data_ document.

Adding Budget Details Manually

NOTE: The Upload Budget function changed the budget narrative from a rich text box to a simple text box.

- Alternatively, to enter a budget manually in ePlan, On the Budget page, click the ***Modify*** link next to the desired account number (see screenshot above).
- For each budget item, click ***Add Budget Detail***.
- Choose the desired account number, line item, budget tags, and location code from the dropdown lists. Only allowable budget line items for this grant appear as options in the dropdown lists.
- Enter the quantity and cost. Disregard the "Optional Program Code" for this application.
- Enter a narrative description in each large narrative textbox.
- Click ***Create*** to add the budget detail to the application.
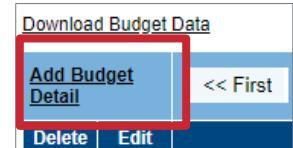
Budget Totals

ePlan auto-calculates the budget totals as budget details are entered and deducts the budgeted amounts from the awarded allocation. Users can see the total calculations a the bottom right-hand corner of the *Update Budget Detail* page

- Once all budget details are complete, confirm that the amount in the *Remaining* area is $0.00.

Major Function Codes

When placing expenditures within the budgets for all grants, use the following guidelines:
- ***71100—Regular Instructional Program***: Expenditures for the direct instruction of students (pre-K–12) in this major function (i.e. salaries and benefits for teachers, educational assistants, contracted services to provide direct instruction, supplies, materials, and equipment used in direct instruction).
- ***71150—Alternative Instruction Program:*** Expenditures for direct instruction of students (pre-K–12) in an alternative instructional setting
- ***71200—Special Education Program:*** Expenditures for direct instruction of students having special needs (pre-K–12 or ages 3-21) (i.e. salaries and benefits for teachers, educational assistants, contracted services to provide direct instruction to students with special needs, supplies, materials, and equipment used in direct instruction) ***NOTE:*** *If it is a single contract with one provider (e.g. Vanderbilt, LeBonheur, etc.) for speech services, include in 71200. If it is a single contract with one provider that includes speech, occupational, and physical therapy services, include in 72220.*
- ***72120—Health Services:*** Expenditures to provide physical and mental health services that are not direct instruction, including medical and nursing services (i.e., salaries and benefits for providing support for instructional programs in health matters, contracted services for health services for students, supplies, materials, equipment to support health educators, and professional development [PD] costs)
- ***72130—Other Student Support***: Expenditures for student supports, other than health services, including guidance, evaluation, testing for general and special education students (i.e., salaries and benefits for guidance counselors, social workers, assessment and support personnel, contracted services for school resource officers [SROs], evaluation and testing services, supplies, materials, equipment for use in support of student support programs, and PD costs) ***NOTE:*** *If using for special education, only use this account series for line items not available in 72220: guidance personnel, social workers, and attendants. If paying for psychological personnel, assessment personnel, or assessment materials, those items must be budgeted in 72220.*
- ***72210—Support Services/Regular Instruction Program***: Expenditures for assisting instructional staff in direct instruction for students (in grades pre-K–12); this includes activities such as curriculum

development, instructional media, coaching, child development, and staff professional development (PD; i.e. salaries and benefits for staff providing instructional support services, contracted services for support services, supplies, materials, equipment related to staff support services, and professional development (PD) costs) **NOTE:** *Administrative expenditures for ESEA programs are typically included in 72210.*

- **72215—Support Services/Alternative Instruction Program:** Expenditures for assisting instructional staff in planning, developing, and evaluating of students having special needs (pre-K–12 or ages 3-21) in an alternative instructional setting
- **72220—Support Services/Special Education Program:** Expenditures for assisting instructional staff in planning, developing, and evaluating the process of providing learning opportunities to students with special needs (pre-K–12 or ages 3-21). This includes activities such as curriculum development, instructional media, coaching, child development, and staff PD (i.e. salaries and benefits for staff providing instructional support services, contracted services for support services, supplies, materials, equipment related to staff support services, and PD) **NOTE:** *If it is a single contract with one provider (e.g. LeBonheur) for occupational therapy and physical therapy services, include in 72220.*
- **72250—Education Technology:** Not an allowable use of funds within the CFA
- **72410—Office of the Principal:** Expenditures for the office of principal for instructional purposes; usually used with supervision of students with disabilities
- **72610—Operation of Plant:** Not an allowable use of funds within the CFA
- **72710—Transportation:** Expenditures for transporting general and special education students for instructional purposes, which includes trips between home and school (includes homeless and foster care), school activities, and mileage reimbursement to parents providing transportation [i.e. salaries and benefits for bus drivers or monitors, contracted services to transport students, supplies, and materials necessary to operate system-owned vehicles for student transportation, and auto-insurance]).
- **73100—Food Service:** Not an allowable use of funds within the CFA
- **99100—Transfers Out:** *Indirect Cost:* Expenditures for use with administration, personnel, and other variable costs incurred by the LEA
- **IDEA Permissive Use of Funds:** A. Adjustment to Local Effort in Certain Fiscal Years; B. Permissive Use of IDEA funds for School-Wide Program; and C. Permissive Use of IDEA Funds for Coordinated Early Intervening Services (LEAs usually use only C. for CEIS.)
- **Coordinated Early Intervening Services (CEIS):** Expenditures that allow LEAs to use up to 15 percent IDEA, Part B, Section 611 and/or IDEA, Part B, Section 619 funds, in combination with other amounts (other than education funds), to develop and implement Coordinated Early Intervening Services, which may include interagency financing structures, for K–12 students (with particular emphasis on students in K–3) who have not been identified as needing special education or related services but who need additional academic and behavioral support to succeed in a general education environment. **NOTE:** *If the LEA is determined to have significant disproportionality based on race and ethnicity utilizing state criteria, the LEA must utilize Coordinated Early Intervening Services [20 U.S.C. 1418 § (d)(2)(B)]. The amount expended by the LEA under CEIS shall count toward the maximum expenditures such LEAs may reduce in Item "A" Adjustment to Local Effort.*

Object Codes

- *100—Personnel Services*: Amounts paid to employees of the LEA
- *200—Employee Benefits*: Amounts paid on behalf of employees for benefits; LEAs must budget benefits within the function in which the corresponding salary is recorded
- *300—Contracted Services*: Amounts paid for services rendered by individuals and/or companies who are not employed by the LEA

- *400—Supplies & Materials*: Amounts paid for items that are consumed, worn out, or deteriorated through use (consumables) such as classroom teaching supplies, office supplies, etc.
- *500—Other Charges*: Amounts paid for goods and services not falling into any other object code classification; funds carried over to the next fiscal year must be budgeted in 599
  - *524—In-Service/Staff Development Services*: Amounts paid in relation to PD, including travel expenditures, must be budgeted in this object code. Amounts paid for substitute teachers for personnel attending PD activities cannot be budgeted here.
- *700—Capital Outlay:* Amounts for equipment items having a useful life of more than one year and a unit cost of $5,000 or more. These items require prior department approval.

Budget Tags

Budget Tags identify the **purpose** of a budget item quickly without overly relying on the budget narratives and can be used to indicate that the money addresses a specific strategy or initiative.

Every FY22 CFA budget page, except for the Title I, Part A, Title IV, Part A, and Title V, Part B budget pages, have tags available for the ***Best for All*** Strategic Plan priorities and initiatives. The ***Best for All*** budget tags are shown in the table below.

Academics	Whole Child	Educators	Engagement and Choice	Turnaround
Early Literacy Supports High-Quality Instructional Materials Innovative Assessments Career Exploration	Supports Character Education to Citizenship and Civics Education Students with Exceptionalities	Recruitment Retention Support	Parent Engagement Community Engagement	Focus Schools Priority Schools

LEAs can assign one or more tags to a budget line item. However, **to take advantage of the full budget tag functionality, it is recommended that LEAs use <u>only one budget tag per line item entry</u>**.

Budget tags are not required in the application, but LEAs should use tags where applicable. To use the budget tag options for each line item, complete the following:
- Add the new line item for the respective grant
- **Select** the **category** from one of the strategic priorities, if prompted **select the initiative**
- Click **update** or **create** and move to the next **budget item**.

In addition to the tags in the table above, the **Title I, Part A** tags also include the following Required Set Aside tags:
- Students Experiencing Homelessness
- Parent and Family Engagement
- Non-Public Instructional Funds
- Non-Public School Parent and Family Engagement

The **Title IV, Part A** tags include only:
- Well-Rounded Education Opportunities

- Safe and Healthy Students
- Effective Use of Technology

The **Title V, Part B** tags include only:
- Title I, Part A
- Title II, Part A
- Title III, Part A
- Title IV, Part A: Well-Rounded
- Title IV, Part A: Safe & Healthy
- Title IV, Part A: Effective Use of Technology
- Parent and Family Engagement.

For more information about the Title I, Part A; Title IV, Part A; and Title V, Part B budget tags, see the respective sections of this guide and the Budget Tag Filtering section below.

Filtering Budget Items

At the top of the *Budget Detail* page, users may filter the budget by account numbers, line item numbers, location codes (i.e., LEA/school organizations), and budget tags. A filter must include criteria for Object Codes, Function Codes, and LEA/School. This function is particularly helpful when looking at LEA set-asides for Title I, Part A; Title IV, Part A; and Title V, Part B. ***NOTE:*** *Use only one budget tag per line item entry to take full advantage of the filtering function.*

As an example, under Title IV, Part A users can choose between three budget tags: *Well-Rounded Educational Opportunities*, *Safe and Healthy Students*, and the *Effective Use of Technology*. **If only one budget tag is entered per line item**, users can apply the budget tag filter to check that the amount of funds set aside for each focus area in the budget aligns with what is entered on the <u>*Title IV, Part A Program Details*</u> page.

To Filter by Budget Tag:
- Once the budget has been entered and the appropriate budget tags have been selected, click ***Account Number*** in the Filtering box at the top of the page. Then click ***Select All****.

- Next, click ***Tags*** to select the desired budget tag. In this example, *Safe and Healthy Students* was selected.

- With *All Account Numbers* and the *Safe and Healthy Students* budget tags filters enabled, the *Budget Detail* page shows across all account numbers only those budget entries tagged as *Safe and Healthy Students*.
- Use the "*Total for filtered Budget Details"* field at the bottom of the page to ensure that the amount entered for the *Safe and Healthy Students* focus area on the Title IV, Part A Program Details page aligns with the amount set aside for this focus area in the budget.

Total for filtered Budget Details:	$70,000.00
Total for all other Budget Details:	$475,819.00
Total for all Budget Details:	$545,819.00
Adjusted Allocation:	$545,819.00
Remaining:	$0.00

Transfers Out and Indirect Cost

Indirect cost represents the expenses of doing business that cannot clearly link to a specific grant, contract, project function, or activity, but are necessary for the general operation of the organization and the activities it performs. These costs cannot attribute directly to any grant because the time and effort spent are not measurable. LEAs may choose to budget for indirect cost for some, all, or no grants within the CFA. Indirect cost is available on each budget page in account number "*99100, Transfers Out."*

	Account Number	Total
Modify	71100 - Regular Instruction Program	$100,000.00
Modify	71150 - Alternative Instruction Program	$0.00
Modify	72120 - Health Services	$0.00
Modify	72130 - Other Student Support	$0.00
Modify	72210 - Support Services/Regular Instruction Program	$70,000.00
Modify	72250 - Education Technology	$0.00
Modify	73100 - Food Service	$0.00
Modify	99100 - Transfers Out	$0.00
	Total	$170,000.00
	Adjusted Allocation	$997,000.00
	Remaining	$827,000.00

ePlan provides automated information regarding the maximum amount permitted for indirect cost within each grant.
- Eligible funds budgeted in all accounts are totaled at the top of the budget page on the **Total Contributing to Indirect Cost** line.
- Each LEA has an individualized, agreed-upon indirect cost rate that is preloaded into ePlan each year.

Indirect Cost	
Total Contributing to Indirect Cost	$100,000.00
Indirect Cost Rate	0.00%
Maximum Allowed for Indirect Cost	$0.00

- Users cannot exceed the **Maximum Allowed for Indirect Cost**. If the total amount budgeted in account number 99100 is more, the LEA receives a validation error and cannot submit the application.

Budget Overview

Most sections have a *Budget Overview* Page that provides a summary of the budgeted amounts, reported by line item and account number. This page serves as a resource to provide a different view of the budgeted amounts. This page requires no input from the LEA.

Budget Overview Plus/Minus

Most sections have a *Budget Overview Plus/Minus* Page that provides a summary of prior approved budgeted amounts by line item and account number with revision amounts displayed in red text. This page serves as a resource to provide a different view of the budgeted amounts and changes made within the current revision. This page requires no input from the LEA

Program Details Pages

All grant programs in the CFA have associated *Program Details* pages. Some of these pages go by other names. These pages require the user to provide information regarding the program(s) implemented with grant funds.

Related Documents

Most sections in the CFA include a *Related Documents* page that provides links to upload external related documents. Table headers indicate if the document is required or optional. If a document is required, ePlan prevents submission of the application without an upload.

Where applicable, the "Document Template" column provides links to download templates or forms for application items. If "N/A" appears in this column, there is no required template for that specific item and users may upload content in any format.

- Download the document template (if applicable), complete the document, and click the **Upload New** link to begin the upload.
- In the Upload Data File line, click the **Select** button to open the file browser.
- In the file browser window, select the correct file and then click **Open.**
- Type the document name into the Document Name field. Name all file names for all uploaded documents to reflect what the file represents
- Click **Create** to upload the document.

On some *Related Documents* pages, the user may post a link to a publicly accessible website that hosts the related document.

Program Assurances

All programs have program assurances which LEAs must review thoroughly. Many sections have *Program Assurances* included with the programs section after the *Related Documents* page. All items specified are requirements of Title I legislation or regulation. By checking the statement at the top of the *Program Assurances* page, An LEA user affirms that they have read and understood all requirements and that the LEA will abide by the same.

ESEA Requirements

ESEA Administration

Check the box at the top of the page if the LEA does not use federal funds for the administration of any of the programs covered in the CFA.

Table 1 applies only to those LEAs using con admin. Percentages are auto-calculated from amounts entered for each contributing program on the *Allocations* page. All information on the table is pre-populated, except if funds from 21st Century are included in con admin. If the LEA has **not** entered amounts in the "ESEA Con. Admin." column on the *Allocations* page, Table 1 does not contain any percentages.

Table 2 requires manual entry if the LEA does **not** use con admin and instead uses ESEA funds for administrative expenses.
- Enter the percentage of funds for the administration of both public and non-public programs in each grant. Manually enter **whole numbers**—no decimal places. Round percentages to the nearest whole number. *NOTE:* the percentage needs to be equal to or higher than the administration costs for each grant utilized but cannot be more than two percent of each program allocation.

ePlan automatically displays each grant allocation and calculates the total administration cost to budget for each grant.
- Check each amount in the "Administration Dollars" column against the total administrative funds that are budgeted within each program budget (public and non-public). Amounts may be higher than the total budgeted amounts in each program but **cannot** be lower.
- Percentages entered **cannot** be higher than administrative limits specified (20 percent for Title I, Part A; Title I Part A—Neglected; Title I, Part C ; Title I, Part D; Title II, Part A; and Title V, Part B, Subpart 2; two percent for; Title III, Part A [ESEA § 3115 (b)]; and Title IV, Part A [ESEA § 4105 (c)]).
- Indicate these amounts in budget narratives so reviewers can easily identify and total amounts.
- For Title I, Part A, enter the amount entered in this table in the *Allocation Designation* area on the line for non-consolidated administrative costs.
- LEAs that are consolidating some, but not all ESEA programs, must also complete Table 2 if using funds for administration in non-consolidated programs.
- Calculate percentages of non-consolidated programs using the current FY allocation award, and do not include carryover funds or exclude amounts transferred out.

ESEA Shared Related Documents

No documents are required in this section.

Consolidated Admin Pool

The *Consolidated Admin Pool* section is not visible unless the LEA transfers funds into con admin on the *Allocations* page. ePlan does not generate this page for LEAs that do not use con admin
NOTE: If the budget amount in Con admin is incorrect, the LEA must make changes to the amounts on the *Allocations* page.

Budget and Budget Overview

Only codes 72210 and 99100 are allowable to budget funds for administrative costs. All costs must be administrative in nature (e.g. program director, clerical staff, bookkeeper, or equipment/inventory management salary/benefits; travel for administrative staff; supplies and equipment for administrative offices; professional development (PD) for administrative staff; etc.).

LEAs must include full-time equivalents (FTEs) in budget narratives and must match the FTEs entered in the *Consolidated Admin. Pool Program Details* page. LEAs must base FTEs on the percentage of time spent on the con admin cost objective.

All expenditures related to the administration of public and non-public programs included in con admin **must** be budgeted in the con admin budget. **No** additional administrative costs for programs may be budgeted in the individual program budgets.

Program Details

- The description of duties and responsibilities must include references to the administration of **all** programs that have contributed to con admin (LEAs must contribute a minimum of $100 by each program according to the department).
- The duties and responsibilities cannot include administrative responsibilities for programs that are not part of con admin.
- Identify the *other funding sources* of staff not paid 100 percent from con admin with the description.
- LEAs must list all administrative staff referenced in the program description in the staffing area and both a head count and an FTE identified for each.
- Staffing and FTEs on this page must match the budget narratives.

Con admin Checklist

Save the page by clicking **Save and Go to > Current Page**, then click **Help for Current Page** in the sidebar for a checklist to determine if the application is ready for submission. If the answers to all the following questions are "yes" and/or "N/A," the application is ready for submission.

Title I, Part A

Budget

- Budget all funds awarded (minus funds contributed to con admin) using the appropriate function, object code(s), and budget tag(s).
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures.

Budget narratives **must** include, if applicable:
- Full-time equivalents (FTEs) for all employees of the LEA funded (indicate regular, summer, preschool, non-public, or system-level position)
- Titles of positions—**not** staff member names—funded, beside the corresponding FTE that matches the titles used throughout the application
- If funds are to support a class size reduction (CSR) teacher, include CSR in the position title, and complete the *Class Size Reduction personnel* page.
- Do not use generic titles such as "teacher" when identifying positions. Teacher titles may include—but are not limited to—interventionist or instructional facilitator.
- Include a breakdown of amounts in LEA-level set-asides for instructional initiatives.
- Label amounts to correspond to each of the set-asides identified on the *District Set-Asides and Overview* page (example in the budget narrative: Family Engagement - $2,500.00).
- When totaled, amounts within the budget narratives must equal the total amounts entered on the *District Set-Asides and Overview* page.
- Breakdown of amounts included in the administration set-aside, if LEAs are **not** using con admin is (example in the budget narrative: Admin - $500.00)
- If LEAs are using con admin, no additional administrative costs may be included in the budget.
- Breakdown of amounts to spend to provide non-public equitable services
- Detailed examples of equipment, materials, and supplies to fund
- Specific professional development to support, the number and type of staff who plan to participate (position titles, not employee names), and expenses to pay
- Description of services to purchase if contracting staff or services
- Indication of a stipend payment, if using funds to pay an existing LEA staff member for work beyond regular work hours.
- Amounts designated as part of an LEA-level set-aside and non-consolidated administrative costs **must** add up to equal amounts entered on the *District Set-Asides and Overview* page and the ***Allocation Designation*** page of the application.

Program Details

Administration: Provide a summary of how the LEA plans to administer the Title I, Part A program. If using con admin, check the box to confirm the consolidation of administrative funds. Additional information is not required.

If not using con admin, check the box stating that the LEA is not using con admin and provide a description of how the LEA administers the Title I, Part A program, including:
- staff responsible for administering the program (titles, no names);
- funding sources of each administrative position (state, local, federal, or combination—*if combination*, provide the percentage from each source);
- FTE of staff identified (must match budget and personnel details pages); and
- summary of duties and responsibilities handled by identified staff.

If no Title I, Part A funds are used to support the administration of the program, the following question must be addressed, as the LEA must demonstrate that Title I, Part A is appropriately administered: "If the LEA is not using con admin funds to run the Title I, Part A program, did the LEA provide a description of how the Title I, Part A program is being administered?"

School-Wide Schools: Describe how each applicable school actively and consistently involves all planning team members and other stakeholders in the development, implementation, and revision of the school plan throughout the year.

School-Wide and Targeted Assistance Programs: Select all checkboxes that apply to identify the type(s) of supplemental services and supports provided for students with Title I, Part A funding. Provide a description if selecting "Other."
- Indicate the number of class size reduction teachers in the LEA funded with Title I, Part A.

> School-wide & Targeted Assistance Prog
> * Identify the type(s) of supplemental servic
>   ☐ Academic interventions (RTI support)
>   ☐ Class-size reduction
>   [   ] # of CSR Teachers

Generally describe the overall plan for use of Title I, Part A funds within the **school-wide (SW) and/or targeted assistance (TA) schools.** Make sure to identify:
- major initiatives supported, grade level and content area focus, and if appropriate, service delivery model(s) used;
- total number of schools in the LEA served (must match the SW and TA school count on the *School Eligibility* page) and for TA schools, the estimated number of students served;
- any unique characteristics of one or more participating schools that are pertinent to Title I, Part A; and
- estimated numbers of students served (targeted assistance only).

Funding Coordination

Check all funding sources the LEA receives and coordinates with Title I funding in support of the district plan.

* Title I, Part C (Education of Migratory Children)
Select... ▾

* Title II, Part A (Teacher & Principal Training and Recruitment)
Select... ▾

* Title III, Part A (English Language Acquisition)
Select... ▾

* Title IV, Part A (Student Support & Academic Enrichment)
Select... ▾

* Title IV, Part B (21st Century Community Learning Centers)
Select... ▾

* Title V, Part B, Subpart 1 (Small, Rural School Achievement)
Select... ▾

* Title V, Part B, Subpart 2 (Rural & Low Income Schools)
Select... ▾

* Title IX, Part C (McKinney-Vento Homeless Assistance)
Select... ▾

* IDEA Part B (Individuals with Disabilities Act)
Select... ▾

* IDEA Preschool
Select... ▾

* Carl D. Perkins (Vocational Technical Education Act)
Select... ▾

Coordination of Funds and Services:

Available funding sources and services to specific populations of students must be coordinated with Title I, Part A to ensure the effective use of resources and that programs are comprehensive, not fragmented.

- Indicate whether funds received are coordinated from the list of funding sources.
- Select the programs and services coordinated with Title I, Part A from the list that includes, but is not limited to Head Start, Even Start, career and technical education (CTE), and services for youth at risk of dropping out.
- **Check N/A** if the LEA receives no funds or if the instructional program is not operating within the LEA.

Student Eligibility—Targeted Assistance Programs

LEAs are required to complete this portion of the CFA if using Title I, Part A funds to implement targeted assistance programs within schools either in the regular school year or during the summer.

- If providing targeted assistance programs with Title I, Part A funds, mark this page "N/A" by checking the box at the top of the page. No additional input is necessary on this page.
- For each identified group of students, select the type of program offered (regular year or summer) by checking the corresponding box. LEAs may select more than one box per row if the data sources used for each are the same. Add rows as needed.
- **Preschool–Grade 2:** Identify the developmentally appropriate measures that determine student eligibility for Title I, Part A supplemental services. Students must be identified through multiple measures (more than one), so add new rows as needed to demonstrate all data sources used. If selecting "Other" for any measure, provide the name of the measure. Provide a description of the specific criteria and data source to determine student eligibility for each row in the text box. This box has a 200-character limit, so ensure that responses are complete but concise.
- **Grades 3–12:** Identify the measures that determine student eligibility for Title I, Part A supplemental services. Identify students through multiple measures (more than one) so add new rows as needed to demonstrate all data sources. If selecting "Other" for any measure, provide the name of the measure. Provide a description of the specific criteria and data sources to determine student eligibility for each row in the text box. This box has a 200-character limit, so ensure that responses are complete but concise.
- **Late-arriving students or students for whom LEA criteria data is not available:** LEAs must be prepared with procedures and processes for determining the eligibility of students who enroll late in the school year or do not have adequate data normally utilized to make eligibility decisions. Identify the alternative sources of data for these students. Students must be identified through multiple measures (more than one), so add new rows as needed to demonstrate all data sources used. If selecting "Other" for any measure, provide the name of the measure. Provide a description of the specific criteria and data sources to determine student eligibility for each row in the text box. This box has a 200-character limit, so ensure that responses are complete but concise.

Homeless Students

ePlan pre-populates the data from the previous school year in the first column of the table.

- Enter the most up-to-date student counts for students experiencing homelessness within the LEA. These counts help plan for the next school year. Data must be from the current school year (when completing the initial application).
- No user entry is required in the "Title, I Part A Homeless Set Aside amount" field. All LEAs are required to set aside a portion of Title I, Part A funds to provide services and supports to students experiencing homelessness for their enrollment, attendance, and academic success. This number is pre-populated from the set-aside amount for students experiencing homelessness entered on the *District Set-Asides and Overview* page.
- No user entry is required in the "Title I, Part A Homeless Set Aside per-pupil amount" field. ePlan auto-calculates this amount from the current number of students experiencing homelessness enrolled in the LEA entered in the first row of the table and the set aside amount entered on the *District Set-Asides and Overview* page.
- Describe how the LEA determined the Title I, Part A homeless set-aside amount. In the description, the LEA may include information regarding the utilization of community partners, per-pupil ratio, and data trends.
- Describe how the LEA eliminates barriers to enrollment in its schools for students experiencing homelessness. Provide information on training provided to staff, policies and procedures that are in place, and other initiatives that address possible enrollment barriers.
- Describe what services the LEA provides to help close the achievement gap between students experiencing homelessness and non-homeless students. If an achievement gap exists, include information about the steps to address it. If no achievement gap exists, indicate what data was reviewed and discuss services that are available for all students who are at risk of not meeting academic achievement goals.
- Describe the process used to determine the best interest of students experiencing homelessness when identifying the school the student will attend. Describe the student-centered factors considered throughout the process.
- Confirm whether the LEA coordinates Title I, Part A homeless set-aside funds and McKinney Vento-supported services using the drop-down box. If the LEA receives McKinney Vento funds, Describe the coordination of Title I, Part A homeless set-aside funds and McKinney Vento-supported services in the narrative box.
- Indicate if the LEA plans to use a portion of the Title I, Part A homeless set aside for the LEA homeless liaison. If yes, identify the percentage of funds used.
- At the bottom of the page, check the assurance box to confirm that the LEA has developed and implemented a clear, written transportation policy and dispute resolution process for students experiencing homelessness.

Students in Foster Care

- Enter the most up-to-date student counts for students in foster care within the LEA. These counts help plan for the next school year, so the data must be the most current and complete data possible.
- Enter the total number of best interest determination (BID) meetings held in the 2020-21 school year as of the submission date of the application.
- Enter the total number of BID meetings resulting in students remaining in their school of origin.

- Indicate if the LEA plans to set aside Title I, Part A funds for costs for transporting students in foster care to their school of origin. LEAs may **not** use funds set aside for students experiencing homelessness to provide for these costs.
- Check the assurance indicating that the LEA has developed and implemented clear written procedures for transporting foster youth to the school of origin, when in the best interest of the student, to ensure that (1) the LEA provides transportation for the duration of the student's time in foster care; and (2) the LEA provides transportation promptly. Budget all transportation in 72710.
- Remember to upload the LEA policy for transporting foster youth into the Title I, Part A *Related Documents* page under the link titled "Foster Care Transportation Procedures."

Personnel Details—System-Wide

- In the first table, Enter both a head count and an FTE for all **system-wide** instruction and support staff supported with Title I, Part A funds. System-wide staff are employees not assigned to a building and work across the LEA in multiple school sites as necessary, but not as part of a planned assignment. Head counts must be whole numbers (no decimals).
- FTEs **must** match FTEs identified in budget narratives (individually and the sum). Titles of staff **must** match titles identified within budget narratives.
- If the LEA is using consolidating administration, do not enter staff into the second table, as these staff must be included in the *Consolidated Administration* section.
- LEAs **not** utilizing con admin must enter the head count and FTE for all system-wide administrative staff in the second table. These are personnel generally working out of the central office, handling administrative duties for Title I, Part A (e.g., monitoring, bookkeeping, completing required reports, completing the consolidated funding application, etc.).
- Titles and FTEs listed for administration **must** match the titles and FTEs identified within the budget narratives.
- Reference identified staff within the narrative description of administration within the *Program Details* page (titles and FTEs must match).

Personnel Details—Regular School Year K–12, School-level

- Enter both a head count and an FTE for all **school-based**, K–12, regular school year instructional and support staff supported with Title I, Part A funds. School-based staff are employees assigned to one or more schools for a pre-determined time. These staff may work full time at one school or may split their time across two or more schools, but LEAs may not duplicate schools.
- Enter head counts and FTEs for staff assignments within schools across the system. School names are pre-populated and numerous staff titles are pre-populated as well. Enter any staff not falling into these pre-populated categories in the "Other" column(s) provided and provide a position title.
- FTEs **must** match FTEs identified in budget narratives (individually and sum). Titles of staff **must** match titles identified within budget narratives.
- Identify staff who are supported with funds spiraled to Title I, Part A schools as specified on the *PPA List* page. Make sure there is alignment between the funds spiraled and the staff supported.

Personnel Details—Summer School K–12, School-Level

If not using Title I, Part A funds to support summer school programs in Title I schools, mark this page "N/A" by checking the box at the top. No additional input is necessary on this page.
- If Title I, Part A funds **are** used to support summer school programs in Title I schools, enter both a head count and an FTE for all **summer school**, K–12, school-level instructional and support staff supported

with Title I, Part A funds. These staff are hired or paid a stipend to implement summer programs in Title I schools.

- To determine an FTE for staff paid with a stipend:
  - o determine the total number of hours worked by each person as part of the summer program;
  - o determine the total number of hours considered full time for each person (total contracted hours during the regular school year); and
  - o divide the number of hours worked in the summer program by the total full-time hours for each person to determine the FTE for the summer program.
- Enter head counts and FTEs for staff assignments within schools across the system. School names are prepopulated, and numerous staff titles are prepopulated. Enter staff not falling into these prepopulated categories in the "Other" column provided and enter a position title.
- In the "Funding" column, select the method that Title I, Part A funds have been allocated to support the summer program. Funds are either spiraled down to schools through the school allocation and are included in the total school allocation on the *PPA List* page or are included in the LEA set-aside and listed on the *District Set-Asides and Overview* page.
- FTEs **must** match FTEs identified in budget narratives (individually and sum). Titles of staff **must** match titles identified within budget narratives.
- Identify if staff will be paid through stipends or if staff members are hired specifically for the summer program only. Both may be selected if the summer program is staffed by both types of staff.

Preschool Personnel Details (School-Level)

- If no Title I, Part A funds support preschool programs, mark this page "N/A" by checking the box at the top of the page. No additional input is necessary on this page.
- If Title I, Part A funds support preschool programs, enter both a head count and an FTE for all **preschool**, K–12, school-level instructional and support staff supported with Title I, Part A funds.
- Enter head counts and FTEs for staff assignments within schools across the system. School names are prepopulated, and numerous staff titles have been prepopulated as well. Enter staff not falling into these prepopulated categories in the "Other" column provided and enter a position title.
- In the "Funding" column, select the method that Title I, Part A funds have been allocated to support the preschool program. Funds are either spiraled down to schools through the school allocation and are included in the total school allocation on the *PPA List* page or are included in the district set-aside and listed on the *District Set-Asides and Overview* page.
- FTEs **must** match FTEs identified in budget narratives (individually and the sum). Titles of staff **must** match titles identified within budget narratives.

Preschool Counts

- If no Title I, Part A funds support preschool programs, mark this page "N/A" by checking the box at the top of the page. No additional input is necessary on this page.
- If information was entered in the Preschool *Personnel Details (School-Level)* page, information **must** be entered on this page; however, it is possible for information entered on the *Preschool Counts* page and **not** on the *Preschool Personnel Details* Page if no Title I funds are used to support instructional or support staff.
- Collect information on schools in which LEAs use Title I, Part A funds, either as an LEA set-aside or as part of a school allocation, to support **preschool programs** within a K–12 Title I school.
- If there is a preschool program offered in a Title I school, but funds other than Title I, Part A fully support it, do not enter information on this page for that school. If **any** Title I, Part A funds are used to support

the preschool program offered in a Title I school, the information on this page must be filled out for that school.

- For each school with a preschool program supported in any way by Title I, Part A funds, complete the following information:
  - o the number of preschool classes supported with Title I, Part A funds that are provided:
    - to students within the school attendance area; or
    - to students from multiple attendance areas across the LEA; or
    - to students in a separate location—not another school within the LEA;
  - o the total number of students enrolled in the preschool;
  - o the total number of students who are low-income (of the total number of enrolled students);
  - o the percentage of students from low-income families (total preschool low-income student count divided by the preschool total enrollment); and
  - o the type of preschool program offered in the school or separate location.

LEAs may only offer a school-wide preschool program in a Title I school-wide school. In a school-wide preschool program, all students are eligible for services.

A targeted assistance preschool program would be offered in a Title I targeted assistance school and only those students identified as most at risk of failing to meet the state's academic achievement standards based on multiple, educationally related, objective criteria—such as developmentally appropriate measures of child development, teacher judgment, and interviews with parents—would be eligible for services.

Class Size Reduction (CSR) Teachers

- If no Title I, Part A funds are used to fund Class Size Reduction (CSR) teachers, mark this page "N/A" by checking the box at the top of the page. No additional input is necessary on this page.
- For each school with Class Size Reduction (CSR) teachers paid with Title I, Part A funds, complete all the information in the chart. After entering data into the table, ePlan pre-populates the projected state and local teacher to student ratio and the grade span projected state and local teacher to student ratio.
- Provide answers to open response questions in this area.
- **In September of the school year**, a second chart will appear on this page. When available, complete the chart. ePlan uses the data entered in the chart to auto-calculate (1) the projected state and local teacher to student ratio and (2) the grade span projected state and local teacher to student ratio.

Identifying and Ranking Schools

Data entered on this page cannot be changed once the original CFA is approved.
Low-Income Data: Choose the poverty measure used by the LEA in making school eligibility determinations for Title I, Part A. This information must also be entered on the *School Eligibility* page. The LEA may select more than one measure, but duplication of names is prohibited. If using multiples measures, identify the main data source on the *School Eligibility* page. While LEAs may use more than one poverty measure, Census, Temporary Assistance for Needy Families (TANF), and Medicaid are typically not main data sources; rather, they are used to identify additional students who may have been missed by free- and reduced-price lunch (FRPL).

- Identify the month and year in which data was pulled and used for eligibility determinations.
- Ranking and Identifying Title I Schools: Single grade span LEAs (only one school serves a grade span within the entire LEA attendance area) and LEAs with an enrollment of fewer than 1,000 students are exempted from eligibility and ranking rules. All schools are eligible for Title I, Part A services.
- Choose the method to allocate Title I, Part A funds to eligible and participating Title I schools. This information informs the sort order assigned to each school on the *School Eligibility* page.

- **District-Wide Ranking**: Rank schools from highest poverty to lowest poverty without regard to grade span and serve in that order.
- **Grade-Span Ranking**: Group schools according to grade spans and then rank by poverty percentage within those grade spans. Serve schools in rank order within grade spans.
  o Select the method to determine the eligibility of ranked schools. This information determines building eligibility on the *School Eligibility* page.
- **District-Wide Poverty Percentage:** Schools at or above the calculated district-wide poverty average are eligible for participation in Title I, Part A.
- **Grade-Span Poverty Percentage:** Each school at or above the grade span poverty percentage average is eligible for participation in Title I, Part A. (If district-wide rank was chosen in the prior step, district-wide grade span average is not an option.)
  o If choosing this option, identify each grade span along with the grade span poverty average for each.

Calculate grade span averages using data entered on the *School Eligibility* page.
- **35 Percent Rule**: Schools with 35 percent or more poverty are eligible for Title I, Part A.
- **50 Percent High School Priority**: LEAs may elect to place priority in ranking and serving high schools with 50 percent or more low income. These high schools may receive priority over all other elementary and middle schools with higher poverty, except those with 75 percent or more low income.
- **School-Wide Waiver of 40 Percent** LEAs may receive a waiver of the 40 percent low-income requirement for Title I, Part A school-wide programs. LEAs that receive waivers must upload the approval on the *Related Documents* page).

Schools "Skipped" in Rank Order: If "skipping" schools within the spiral, LEAs must demonstrate that schools skipped receive **supplemental** state and/or local funds **equal to or greater** than what would have been allocated through Title I, Part A to provide services for low-achieving, at-risk students. If skipping more than one school, use the ***Add Row*** feature.

The LEA cannot consider state and/or local funds allocated to the school for the basic educational program offered. Only supplemental funds, in addition to those necessary for the basic educational program, may be considered when requesting to skip a school in the spiral. Be sure to include:
- names of the individual schools skipped;
- funding source(s), not federal, of the supplemental resources; and
- the amount, by school, received from the supplemental funding source.

Based on the final spiral within the CFA, the supplemental amounts listed for each skipped school must be equal to or more than the amount the school(s) would have received in the spiral.

School Eligibility

All LEAs receiving Title I, Part A must complete this page. This page ranks schools within the LEA based on poverty, identifies Title I eligible schools, and determines the type of Title I, Part A program operated in participating schools.

NOTE: Columns A, B, and D are pre-populated, based on information in the school directory. If there are discrepancies, please report errors to ePlan.Help@tn.gov.

Column A—School Name: (pre-populated from School Directory)

Column B—LEA ID – School Number: (pre-populated from School Directory)

Column C—Charter School: Check this box if the school is a Charter School.

Column D—Grade Span: (Pre-populated from School Directory)

Column E—Service: Choose Title I service type from the drop-down box in this column for each school.

NOTE: Enter enrollment data (Columns F and G) and poverty information (Columns I through O) for each school and determine Title I eligibility before completing Column E (Title I Service).

- **Column F—K–12 Public Enrollment**: Enter the current K–12 public enrollment for each school. If the school's grade span includes pre-K, *exclude the number of pre-K students from the count.*
- **Column G—K–12 Non-Public Attendance Area**: For each school, enter the number of non-public students residing with the public school attendance area. This represents the number of students who would attend the public school, based on their home address, but have chosen to attend a non-public school. The physical location of the non-public school does **not** have to be within the attendance area.
- **Column H—All Students (K-12 Public Enrollment + Non-Public Attendance Area):** ePlan auto-calculates the total public and non-public count for each school by adding columns F and G.
- **Column I—Poverty Factor:** Select the correct poverty factor from the drop-down menu (i.e., FRPL, DC, or DC x 1.6 multiplier). This is the main data source the LEA has chosen to identify economically disadvantaged children. The data source identified must match the data on the *Identifying and Ranking Schools* page and must be consistent across all schools (see the chart below for clarification). Consistency does not mean that the same data must be used by all schools, as some data sources are considered equivalents:

Poverty Factor / Data Source	Equivalent Poverty Factor/Data Source
Free & Reduced Price Lunch (FRPL)	DC X 1.6 Multiplier
Direct Certification (DC)	No Equivalent—DC must be used for all schools

- **Column J—Public Count**: Enter the total number of K–12 public students identified as low-income based on the poverty factor chosen.
- **Column K—Adjusted Public Count:** This is an auto-calculated field that equals the number in column J multiplied by the 1.6 multiplier if the LEA chose the poverty factor "DC x 1.6 Multiplier". If another poverty factor was chosen, the number in Column K is the same as the number entered in Column J.
- **Column L—Non-Public Count:** In **Column L**, based on the poverty factor used for non-public schools, enter the total number of students residing in the attendance area and attending non-public school who are low-income. ***NOTE:*** *Non-public poverty counts are collected from each participating non-public school where identified resident children attend. Poverty may be determined using FRPL (if offered by the non-public school), a survey that utilizes the same poverty criteria as FRPL, or by proportionality.*
- **Column M—Total Low-Income K+L:** This auto-calculated column provides a total number of K–12 low-income students by adding the numbers entered in Columns K and L.
- **Column N—Percent (J+L)/H:** This auto-calculated column provides the percentage of low-income students (i.e., Column J and L divided by Column H) before any direct certification multiplier is applied.
- **Column O—Adjusted Percent M/H:** This auto-calculated column provides the adjusted low-income percentage with the direct certification multiplier applied (i.e., Column M divided by Column H). ***NOTE:*** *If "DC + 1.6 Multiplier" was not chosen, the values in Columns N and O are the same.*
- **Column P—Sort Order (Asc):** Identify the sort order assigned to each school. Schools with "1" are served first; schools with "2" are served second, and so on. Sort order is determined by the method of allocation of funds selected on the *Identifying and Ranking Schools* page under "Identify the method the LEA will use to identify Title I eligible schools." The following rules apply when assigning sort order to schools:
  - Schools with a 75 percent or more low-income percentage **must** be assigned a sort order of "1." These schools must be served first, in order by low-income percentage, before any other schools can be served, regardless of grade span.
  - If the LEA selected priority for high schools with 50 percent or more low-income students on the *Identifying and Ranking Schools* page under "Identify the method the LEA will use to identify Title I

eligible schools," these schools would be assigned a sort order of "1" unless there are schools with 75 percent or more low-income students. In that case, high schools with 50 percent would be ranked as "2" after all schools with 75 percent.

- o If the LEA selected district-wide rank as the method of allocating funds on the _Identifying and Ranking Schools_ page under "Identify the method the LEA will use to identify Title I eligible schools," the sort order for all schools can either be "1," or the column can be left blank. This means that the LEA plans to serve all schools in rank order regardless of grade span.
- o If the LEA selected grade span rank as the method of allocating funds on the _Identifying and Ranking Schools_ page in the _Ranking & Identifying Title I Schools_ area, the sort order of "1" would be assigned to the grade span that is served first. If there are schools with 75 percent or more low-income, those schools would have the sort order of "1," and the schools in the first priority grade span would be assigned a sort order of "2." The second grade span served would be assigned a "3" sort order, etc.
- o If the LEA has less than 1,000 students enrolled or has only one school per grade span, sort order is not necessary, as the ranking and serving rules do not apply.
- **Column Q—Eligibility For Service:** _This column does not require user input_. Checkmarks are pre-populated beside each school eligible based on all data available. The system considers the following data:
  - o The method of qualification of attendance areas in schools selected on the _Identifying and Ranking Schools_ page (35 percent rule, district-wide poverty average);
  - o If the LEA enrollment is under 1,000 or has a single school per grade span; and
  - o The poverty percentages in Column O as compared to the district-wide poverty average, the district-wide grade span poverty average, or the 35 percent rule.

If the LEA selects district-wide grade span poverty average on the _Identifying and Ranking Schools_ page, the system does not automatically determine eligibility. The LEA must compare schools within each grade span to the grade span average and indicate eligibility in Column R.

- Once school eligibility for Title I, Part A services has been determined, return to Column E and select the type of service offered to each school from the drop-down menu. Below is a list of each type of service:
  - o **School-Wide (SW):** 40 percent or more low-income required
  - o **School-Wide Waiver (SW (waiver)):** A school that has received a waiver from the department to operate a school-wide program without meeting the 40 percent low-income requirement (requires LEAs to upload the approval letter on the _Title I Related Documents_ page)
  - o **Targeted Assistance (TA):** allowable for any eligible school
  - o **Skip School:** a school may be skipped within the eligibility rank identified if:
  - o The school is receiving state or local funds to provide for Title I, Part A-like services to at-risk students.
  - o The state or local funds supporting Title I, Part A-like services is at least equal to the Title I, Part A funds the school would receive if it were not skipped in the ranking.
  - o **Grandfathered (GF):** a school may be grandfathered into Title I, Part A eligibility if the school was eligible for Title I, Part A in the prior year (based on standard eligibility options).
  - o Grandfathered schools must be identified as school-wide grandfathered (GF (SW)) or grandfathered targeted assistance (GF (targeted)).
  - o **None:** a school that is either ineligible for Title I, Part A or is eligible but not participating.
- **Column R—Eligibility by Other Factors:** Grandfathered schools are not automatically marked as eligible in Column Q. LEAs must identify these schools as eligible in this column.
  **NOTE:** Grandfathered schools are not automatically marked as eligible in Column Q. LEAs must identify Grandfathered schools as eligible in Column R.

- **Column S—School Designation,** select the school designation for each school from the drop-down box. The default in column S is "None". LEAs must change the dropdown to reflect the school designation for schools that are Focus, Priority, Reward, Comprehensive Support and Improvement (CSI), and Additional Targeted Support and Improvement (ATSI).

District Set-Asides and Overview

District set-asides are funds necessary for district-wide instructional initiatives that benefit all Title I schools across the LEA, cannot be allocated to individual schools, and require the effective implementation of set-aside Title I, Part A funds.

All set-asides identified on the *District Set-Aside and Overview* page must include a narrative response to describe the initiative, justify the expenditures, and identify the schools impacted by the set-aside.

- Access the narrative entry by clicking the plus sign ("+") within each set-aside category.

Required Set-Asides

Students Experiencing Homelessness: ESEA requires that Title I, Part A funds be set aside in a sufficient amount to provide services and supports to students experiencing homelessness in the LEA. This set aside **may** pay for the LEA homeless liaison salary and incremental costs to transport a homeless child or youth to and from the school of origin. While the law does not require a specific amount, all LEAs must set aside an amount that is sufficient to meet the needs of identified students experiencing homelessness.
NOTE: *For FY22, answer **all** narrative questions related to students experiencing homelessness on the* <u>Homeless Students</u> page*. No narrative questions are required on this page for the Students Experiencing Homelessness set-aside.*

Required Parent and Family Engagement for Public Schools: LEAs receiving at least $500,000 in Title I, Part A must set-aside at least one percent of their Title I, Part A allocation for family engagement activities in Title I schools. Title I schools must allocate 90 percent of this set-aside for school-specific parent and family engagement activities. ePlan auto-calculates the required set-aside amount for public school parent and family engagement and the 90 percent amount that must be distributed to Title I schools.

- Enter the amount budgeted for the required parent and family engagement set-aside.
  - *If the amount entered by the user is not equal to the amount calculated by ePlan, ePlan generates a validation error that prevents submission of the CFA.*
  - *LEAs that receive less than $500,000 in Title I, Part A funds are not required to enter an amount in this field.*
  - *If the LEA is providing Title I, Part A services to non-public students, and is required to set aside one percent for parent and family engagement, the required non-public set-aside amount for non-public family engagement is calculated and entered in the Equitable Services section.*
- In the narrative boxes, describe how the LEA will use the parent and family engagement set-aside including LEA- and school-level purchases, programming, materials, and professional development.

Additional Parent and Family Engagement:
- Enter an amount in this cell for either of the following cases:

- o   The LEA is **not required** to set aside one (1) percent for parent and family engagement activities but chooses to set-aside funds to support such activities, *__or__*
- o   The LEA is required to set aside one percent and chooses to set aside **more than that amount** for parent and family engagement. LEAs must enter any amount over the one percent requirement here.
- In the narrative boxes, describe the LEA and school-level activities funded, and list the impacted schools.

Set-Asides for Services to Students in Non-Public/Private Schools

If no non-public schools are participating in Title I, Part A no entries are required in this area.

Non-Public/Private Schools Instructional Funds: ePlan pre-populates the amount of non-public instructional funds, if any, from the ***Equitable Services for Non-Public Schools***, *Program Details-Title I, Part A* page (Line F). In the narrative boxes, describe the initiative and list all schools impacted.

Non-Public/Private Schools Parent and Family Engagement: If LEAs are required to set aside one percent for parent and family engagement and are providing Title I, Part A services to non-public school students, the non-public schools must also spend one percent of the equitable share on parent and family engagement activities. ePlan auto-calculates the Non-Public/Private Schools Parent and Family Engagement amount. In the narrative box, describe how the parent and family engagement set-aside will be used including LEA- and school-level purchases, programming, materials, and professional development.

Additional District-Wide Instructional Initiatives

- For each of the additional district-wide instructional initiatives, provide the amount set aside in the budget, provide the description and justification for the initiative, and identify which schools are impacted in the narrative boxes.

English as a Second Language Programs: Include costs related to the facilitation of district-wide instructional initiatives for English learners.

Extended School Day & School Year Programs: Include costs associated with the implementation of a **district-wide** summer, before-, or after-school program. Do not include costs within individual schools, as LEAs must allocate these funds to the school via the spiral on a per-pupil basis.

Foster Care Transportation: Use a portion of Title I, Part A to support the costs of transporting students in foster care to the school of origin, if that is in the best interest of the student. (budgeted in 72710)

Preschool Programs: Include costs with the implementation of a district-wide preschool program.

Professional Development Initiative: Include district-wide professional development initiative costs (e.g., system-wide coaches and instructional facilitators, costs related to district-wide professional development initiatives) that cannot be spiraled down to schools as part of school allocation. Attendance at conferences and trainings are not district-wide professional development initiatives unless the conferences and trainings are specifically focused on the areas of focus identified by the LEA and are part of the district plan. Typically, professional development costs would be spiraled down to each school to align with school plans.

Reservation of funds for FY23 (not to exceed 15 percent): Include the funds the LEA intends to carry over into the next fiscal year. Include here any contingency funds that the LEA would like to set aside for things like workmen's compensation claims, unexpected medical leave, charter school expansions, etc. When these costs occur, LEAs may remove them from this set-aside and place them into the appropriate category based on the expense.

Salary Equalization: Determine the average salary and benefit-cost for teachers and charge only that average amount to Title I schools for every supported teacher. Excess costs beyond the average salary and benefits are combined and set aside at the LEA-level.

Supplemental Funds for Services to Neglected Youth: Additional funds for instructional initiatives focused on services for neglected youth.

Support for Focus and Priority Schools: Include targeted, district-wide instructional initiatives focused on schools in these categories. Do not include costs of programs in these schools that are not district-wide initiatives, as school-based programs must be funded out of school allocations awarded through the spiral.

The total funds amount at the bottom of the page is auto-calculated based on the entries provided by the LEA. This amount of money carries over to the *Allocation Designations* page, and the funds available for allocation to schools are reduced by this amount.

All amounts entered as district set-asides must equal amounts identified within the budget narrative. Budget narratives must specify set-aside amounts and must be labeled to correspond to the district-wide set-aside. For example, include all amounts within the budget that are part of a district-wide professional development set-aside within the narrative and identify them as part of the professional development set-aside. All amounts within the budget narratives must equal the amounts on the *District Set-Aside and Overview* page.

Allocation Designations

All fields on this page are pre-populated, except for the *"Total Amount Reserved for District Administration."* If the LEA is not using con admin, the LEA must enter the total Title I, Part A funds used for Title I, Part A administration. If applicable, this number must include public and non-public funds. The amount entered by the LEA in the "Total Amount reserved for District Administration" must equal the amounts identified within the budget narratives as LEA administrative costs (public and non-public). These costs must be budgeted in 72210. If the LEA is using con admin, leave this field empty.

See the table below to determine the source of pre-populated amounts:

Line Title	Source of Data
Allocation Amounts	
Title I, Part A Regular Allocation	*Allocations* page—Original Allocation plus Title II, Part A & Title IV, Part A funds transferred in, if any
Carryover/Additional Funds	*Allocations* page—Incoming Carryover
Total Allocation Amount	Auto-sum of Title I, Part A Allocation and Carryover/Additional Funds
School Allocations	
Total Allocation Amount	Auto-sum of Title I, Part A Allocation and Carryover/Additional Funds
Total Set-Asides	District Set-Asides page—Total Amount at the bottom of the page
Total Indirect Costs	Title I, Part A Budget—Total amount budgeted in line 99100 Indirect Costs
Total Amount Contributed to Con Admin (public and non-public)	*Allocations* page—Amount entered in column 8 (Con admin) on the From Title I, Part A row
Total Amount Reserved for District Administration (public and non-public)	User Entry—total of funds budgeted in 72210 for public and non-public administration

Line Title	Source of Data
Total Available for School Allocations	Auto-calculation subtracting set-asides, indirect costs, con admin, or administration from the total allocation amount
Per Pupil Amount (PPA) for 100% Factor (Option 1)	
Total Available for School Allocations	Auto-calculation subtracting set-asides, indirect costs, con admin, or administration from the total allocation amount
Divide by total number of low-income students in Title I schools *(displays if the LEA is not serving any schools below 35% low-income.)*	*PPA List*—Total number of low-income, public school students within Title I participating schools
100% Factor	Pre-populated with 1.00
Final PPA	Auto-calculation dividing the total available for school allocations by the number of low-income, public school students in Title I schools to determine the average per-pupil amount available
Per Pupil Amount (PPA) for 125% Factor (Option 2)	
Division by total number of low-income students in all LEA schools *(displays if the LEA serves any schools below 35% low-income.)*	*School Eligibility* page—Total number of low-income, public school students within the LEA (column J)
Initial per-pupil amount	Auto-calculation dividing the total allocation amount from a previous step by the total low-income students in the LEA to determine the average per pupil
125% Factor	Pre-populated with 1.25
Final PPA	Auto-calculation multiplying the initial per-pupil amount from the prior step by 125% to determine the minimum per-pupil allocation (at least this amount must be allocated per pupil on the *PPA List* page in all Title I schools, except the final school served in the spiral)

PPA List

Per-Pupil Allocation (PPA) is the amount of funds allocated to each low-income student within a Title I school to implement a Title I, Part A program. PPA amounts must be sufficient to operate a viable and effective program and must be at least $100.

						Average Per Pupil Amount (PPA) $		1000.00
School/ Attendance Area	**Sort Order**	**Poverty Factor**	**Poverty %**	**# of Public Low Income Students**	**PPA Per Low Income Student**	**Total PPA Amount E X F**	**Family Engagement**	**Total G + H**	**Include In School-wide Pool**
A	B	C	D	E	F	G	H	I	
Example Elementary School		FRPL (Free and Reduced Lunch)	0.00	100		0.00		0.00	☐
			Total Low Income	100	Total Allocations	0.00	0.00	0.00	
					Remaining	100,000.00			

- **Column A—School/Attendance Area**: This column is pre-populated with all schools within the LEA from the school directory. *If errors exist in this column, contact ePlan.Help@tn.gov.*

ePlan pre-populates schools designated as Title I participating on the _School Eligibility_ page. If the information in Columns B, C, D, or E is incorrect, the LEA must make edits to the _School Eligibility_ page.

- **Column B—Sort Order**: This column is pre-populated with the data from the _School Eligibility_ Page.
- **Column C—Poverty Factor**: This column is pre-populated with the data from the _School Eligibility_ Page.
- **Column D—Poverty Percentage**: This column pre-populated with the data from the _School Eligibility_ Page.
- **Column E—Number of Public Low-Income Students**: This column pre-populated with the data from the _School Eligibility_ Page.
- **Column F—PPA Per Low Income Student:** The LEA must enter the PPA for every low-income student in each participating Title I school/attendance area.
  - o In Column F, the LEA must enter the PPA determined by the LEA for all participating Title I schools, and it must be equal to or greater than the "Final PPA" amount on the _Allocation Designations_ page **if** the LEA is serving one or more schools below 35 percent low-income. If the LEA is **not** serving any schools below 35 percent, the PPA may be lower than the "Final PPA" amount on the _Allocation Designations_ page.
  - o PPA amounts entered must be in rank order based on the sort order chosen earlier in the process.
  - o If the LEA uses district-wide ranking, the PPA amounts must also be in rank order or all the same.
  - o If the LEA uses grade span ranking, the PPA amounts must rank each grade span or all the same.
  - o Regardless of the sort order used, LEAs must serve schools with 75 percent or more low-income students. These schools must receive the highest PPA amount **or** the same as all other schools within the LEA.
- **Column G—Total PPA Amount E X F:** This is auto-calculated. ePlan multiplies the value in column E times the value in column F.
  - o The total amount at the bottom of Column G must be as close to $0 as possible (without being negative) and cannot be more than $50. The goal is to allocate **all** available funds to participating schools. **_NOTE:_** _If the LEA has a remaining amount of more than $50, ePlan generates a validation error which prevents the LEA from submitting the CFA._
- **Column H—Family Engagement:** LEAs must distribute the public school family engagement funds set-aside on the _District Set-Asides and Overview_ page between each school/attendance area.
  - o The total amount of column H **must be at least 90 percent** of the required district-wide family engagement set aside (if a minimum family engagement set-aside is required).
  - o If the LEA is not required to set-aside funds for family engagement but has indicated an amount of **additional** family engagement funds on the _District Set-Asides and Overview_ page, the total of Column H cannot exceed that set-aside amount but may be less. **_NOTE:_** _If the LEA is required to distribute 90 percent of the 1 percent set-aside for school-specific family engagement activities but has received approval from each school to allocate less than 90 percent to Title I schools, upload the appropriate documentation from **each school's principal** on the _Related Documents_ page._
- **Column I—Total G + H:** This is auto-calculated. ePlan adds the value in column G to the value in column H to display the total amount of funds available for public school services in each Title I school.
- **Include in School-Wide Pool:** Place a check in the box in this column for Title I schools consolidating funds into a single school-wide pool. If schools are not participating in the Title I, Part A consolidated pilot, this column is not applicable, and check no boxes. By placing a check in one or more of these boxes, ePlan creates a new page within the CFA, _School-Wide Pool._ If clicked in error, unclick the box, and the _School-Wide Pool_ page will disappear.

Related Documents

This page allows the LEA to upload additional documentation in support of the Title I, Part A application. Some required templates provide supporting information as necessary, and an "Additional Supporting Document(s)" category is available to upload items that do not fall into the categories provided.

- *Foster Care Transportation Procedures:* All LEAs are required to have written procedures for providing transportation for foster care students to the school of origin. Written procedures must be uploaded.
- *Supplement Not Supplant Methodology:* All LEAs are required to upload supplement not supplant methodology unless the LEA has only one school OR only one school per grade span, LEAs must submit a written methodology for all schools in the LEA, even if only one school is served with Title I funds. If the LEA meets one of the exemptions, the LEA does not need to provide a written methodology but should upload a letter on LEA letterhead explaining why no methodology is required
- *Title I Skipped Schools Letter:* If the LEA has indicated in the *Program Details* page and the *School Eligibility* page that one or more schools are to be skipped, upload a letter that includes all required information.
- *Additional Supporting Document(s) (CFA):* Upload any other related documents to support the CFA (e.g., family engagement letter granting approval to distribute less than 90 percent of set-aside to Title I schools from **each** school's principal).
- *Title I School-Wide Waiver Approval Letter:* Upload the letter of approval from the department for Title I programs for school(s) that do not meet the 40 percent threshold.

Name all file names for all uploaded documents to reflect what the file represents (e.g., Family Engagement Funds Letter, Skipped School Letter, etc.).

Title I, Part A Program Assurances

By checking the statement at the top of the *Program Assurances* page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

Title I, Part A Checklist

Save the page by clicking **Save and Go to > Current Page**, then click **Help for Current Page** in the sidebar for a checklist to determine if the application is ready for submission. If the answers to all the following questions are "yes" and/or "N/A," the application is ready for submission.

Title I, Part A—Neglected

Budget

- Budget all funds awarded (minus funds contributed to con admin) using the appropriate function, object code(s), and budget tag(s).
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures.
- Budget narratives **must** include, if applicable:
  - FTEs for all employees of the LEA to be funded with Title I, Part A—Neglected funds;
  - Titles of positions—**not** staff names—to be funded, beside the corresponding FTE that matches the titles used throughout the application;
  - A breakdown of amounts to be used for Title I, Part A—Neglected administration, if the LEA is not using con admin (if the LEA is using con admin, **no** additional administrative costs may be included in the budget);
  - Amounts must equal the administrative percentage identified in the *ESEA Requirements* section.
  - Examples of equipment, materials, and supplies to be funded; be as specific as possible on major purchases. For example, if purchasing laptops, please indicate the number of laptops and the approximate cost of each laptop.
  - Specific professional development supported, the number and type of staff who participate (position titles, not employee names), and expenses to be paid
  - Description of services to be purchased if contracting staff or services;
  - Indication of a stipend payment, if funds are paid to an existing LEA staff member for work beyond regular work hours.

Budget Overview

No input is required by the LEA. A summary of the Title I, Part A—Neglected budgeted amount is reported by line item and account number. This page is a resource to provide a different view of the budgeted amounts.

Budget Overview Plus/Minus

No input is required by the LEA. A summary of prior approved budgeted amounts is reported by line item and account number with revision amounts displayed in red text. This section is a resource to provide a different view of the budgeted amounts and changes made within the current revision.

Program Details

- **Program Administration:** If the LEA is using con admin, check the box to confirm the consolidation of administrative funds. No additional information is required.
- If the LEA is not using con administration, check the box stating that the LEA is not using con admin and provide a description of how the LEA administers the Title I, Part A—Neglected program, including:
  - Staff responsible for administering the program (titles, no names);

- - Funding sources of each position (state, local, federal, or combination—*if combination*, provide the percentage from each source);
  - FTE of staff identified (must match budget and personnel details pages); and
  - Summary of duties and responsibilities handled by identified staff.
- Provide the name of the facility served by the LEA and identify the personnel to be hired using Title I, Part A—Neglected funds. If the LEA has more than one facility use the "Add Row" link to create additional rows in the table to provide this information for each facility.
- Describe the facility (facilities) to receive Title I, Part A—Neglected funds. Describe the characteristics of children and youth participating in the program (including learning difficulties, substance abuse, and other special needs) at each of the facilities served. Describe the program details for the facility. *(e.g. This program serves males from ages 12–18, who need Alcohol & Drug (A & D) counseling for substance abuse. This is a short-term care facility where the average stay is fewer than 90 days, and most students are placed by guardians or insurance.)*
- Describe how the Title I, Part A—Neglected funds will be used in each facility to support the educational programs for students in the facility (facilities). Include enough information to show that supported services are supplemental to what the facility is required to provide in the absence of federal funds. List the intended purchases and the outcomes expected as a result of the purchases. *(e.g. Facility A will purchase a supplemental reading program, Read 180, to increase the reading levels of the students by one grade level.)*
- Describe the LEA's process for evaluating and monitoring the facilities participating in the Title I, Part A—Neglected program. Describe how the LEA will monitor the facility programming with on-site monitoring, not less than once every three years. (This is the minimum requirement. However, it is recommended that applicants also included details about monthly calls, inventory tracking, etc. that occur throughout the year.)

Related Documents

This page allows the LEA to upload additional documentation in support of the *Title I, Part A—Neglected* application. LEAs receiving Title I, Part A—Neglected funds must upload the following:
- A signed memorandum of understanding (MOU) or formal agreement to the *Related Documents* page for each facility that is served through the Title I, Part A—Neglected program.
- The needs assessment, completed by each facility on the form provided by the department.
  NOTE: *Uploading the facility application, contracts, and monitoring tools would be considered a best practice but is not required.*

Title I, Part A—Neglected Program Assurances

By checking the statement at the top of the *Program Assurances* page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

Important Reminders and Title I, Part A—Neglected Checklist

Ensure there is alignment between the needs assessment, the program details, and the budget. For example, if math tutoring is identified in the needs assessment, it must also be listed in the program details question that asks about how funds will be spent, and a tutoring position must be listed in the budget. Conversely, all items listed in the budget must be reflected in the needs assessment and budget details.

Save the page by clicking **Save and Go to > Current Page**, then click **Help for Current Page** in the sidebar for a checklist to determine if the application is ready for submission. If the answers to all the following questions are "yes" and/or "N/A," the application is ready for submission.

Title I, Part C

Budget

- Budget all funds awarded (minus funds contributed to con admin) using the appropriate function, object code(s), and budget tag(s).
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures.
- Budget narratives **must** include, if applicable:
  - o FTEs for all employees of the LEA to be funded with Title I, Part C funds;
  - o Titles of positions—**not** staff names—to be funded, beside the corresponding FTE that matches the titles used throughout the application;
  - o A breakdown of amounts to be used for Title I, Part C administration, if the LEA is not using con admin (if the LEA is using con admin, **no** additional administrative costs may be included in the budget); **NOTE:** *Amounts must equal the administrative percentage identified in the ESEA Requirements section.*
  - o Examples of equipment, materials, and supplies to be funded; be as specific as possible on major purchases. *(e.g. If purchasing laptops, please indicate the number of laptops and the approximate cost of each laptop.)*
  - o Specific professional development supported, the number and type of staff who participate (position titles, not employee names), and expenses to be paid;
  - o Description of services to be purchased if contracting staff or services;
  - o Indication of a stipend payment, if funds are paid to an existing LEA staff member for work beyond regular work hours.

Budget Overview

No input is required by the LEA. A summary of the Title I, Part C budgeted amounts is reported by line item and account number. This section is a resource to provide a different view of the budgeted amounts.

Budget Overview Plus/Minus

No input is required by the LEA. A summary of prior approved budgeted amounts is reported by line item and account number with revision amounts displayed in red text. This section is simply a resource to provide a different view of the budgeted amounts and changes made within the current revision.

Program Details

Program Administration: This is a summary of how the LEA plans to administer the Title I, Part C program.
- If **using con admin**, check the box stating that the LEA plans to consolidate funds. No additional input from the LEA is required *in this area.*
- If **not using con admin**, check the box to confirm the LEA is not using con admin and provide a description of how the LEA plans to administer the Title I, Part C program, including:

- o Staff responsible for administering the program (titles, no names);
- o Funding sources of each position (state, local, federal, or combination—*if combination*, provide the percentage from each source);
- o An FTE of staff identified (must match budget and personnel details pages); and
- o A summary of the duties and responsibilities assumed by identified staff. **NOTE:** *If no Title I, Part C funds support the administration of the program, address the question to demonstrate that the LEA administered Title I, Part C appropriately.*

Student Numbers for Category 1 and Category 2 students: ePlan pre-populates the total number of eligible migratory children and youth in each category for 2018-19 and 2019-20. Review the tables.

Priority for Services: ePlan pre-populates the total number of eligible migratory children and youth that qualified for Priority for Services in 2019-20. Review the Priority for Services table, then provide (1) how many migratory students met the criterion of being more than a year behind, failing, or most at risk of failing in 2019-20 and (2) how many migratory students meet the criterion of being a student who dropped out (out-of-school youth) of the LEA in 2019-20.

Individual Needs Assessment: Describe the LEA's process for conducting migratory individual needs assessments (INA). Include details about (1) who is involved in the needs assessment, (2) the general timeline for conducting the INA, (3) what data is analyzed and how that data is gathered, (4) how the results of the needs assessment are used to impact the educational services provided, and (5) how the LEA will ensure that needs assessments are monitored and updated at least every 4.5 weeks.

Family Engagement: Describe the LEA's plan and/or process for conducting the LEA-level migratory parent advisory committee (PAC). Include in the description potential timelines for meetings, events, or convenings.

Programming: Indicate the type(s) of activities supported with Title I, Part C from the checkboxes.
- For each area selected, as applicable, enter the number of staff impacted. The count must be a head count, not an FTE, and be a whole number. Numbers must quantify the number of staff impacted by the activities supported with Title I, Part C, not the number of staff paid from Title I, Part C.
- For each option selected, provide a concise summary of the activities supported. Descriptions must contain information regarding all expenditures that are outlined in the budget.

Title I, Part C Personnel Details—School-Based and System-Wide

In the tables provided, categorize all staff paid with Title I, Part C funds in one of three areas: school-based (serves one site), system-wide instruction (serves multiple school sites), or system-wide administration (central office). Personnel details must align to budget details. For each category, several widely used position titles have been prepopulated. Enter any staff not aligned to these prepopulated categories in the "Other" row and provide a position title. Use the "Add Row" link to add additional "Other" rows to the table to provide information for additional staff. **NOTE:** *FTEs* **must** *match FTEs identified in budget narratives (individually and the sum), and titles of staff* **must** *match titles identified within budget narratives.*

- ***School-Based Staff Instruction & Support:*** Enter a head count **and** an FTE for all **school-based** instructional and support staff supported with Title I, Part C funds. School-based staff are *employees who are assigned to one or more schools for a pre-determined amount of time*. These staff may work full time at one school or be split among two or more schools.
- ***System-Wide Instruction & Support:*** Enter a head count **and** an FTE for all **system-wide** instructional and support staff supported with Title I, Part C funds. System-wide staff are *employees who are not assigned to a building*. These staff work across the LEA with multiple school sites and not as part of a planned assignment.

- *System-Wide Personnel:* If not using con admin, enter the head count **and** FTE for all system-wide administrative staff. These are personnel generally working out of the central office, handling administrative duties for Title I, Part C (i.e., monitoring, bookkeeping, completing required reports, and the consolidated funding application, etc.).

Title I, Part C Program Assurances

By checking the statement at the top of the _Program Assurances_ page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

Title I, Part C Checklist

Save the page by clicking **Save and Go to > Current Page**, then click **Help for Current Page** in the sidebar for a checklist to determine if the application is ready for submission. If the answers to all the following questions are "yes" and/or "N/A," the application is ready for submission.

Title I, Part D

State Agencies (i.e., DOC and DCS) must contact the Non-Traditional Educational (NEP) team regarding this section.

Budget

- Budget all funds awarded (minus funds contributed to con admin) using the appropriate function, object code(s), and budget tag(s).
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures.
- Budget narratives **must** include, if applicable:
  - FTEs for all employees of the LEA to be funded with Title I, Part D LEA funds;
  - titles of positions—**not** staff names—to be funded, beside the corresponding FTE that matches the titles used throughout the application;
  - a breakdown of amounts to be used for Title I, Part D LEA administration, if the LEA is not using con admin (if the LEA is using con admin, **no** additional administrative costs may be included in the budget); ***NOTE:*** *Amounts must equal the administrative percentage identified in the ESEA Requirements section.*
  - examples of equipment, materials, and supplies to be funded; be as specific as possible on major purchases. *(e.g. If purchasing laptops, please indicate the number of laptops and the approximate cost of each laptop.)*
  - specific professional development supported, the number and type of staff who participate (position titles, not employee names), and expenses to be paid;
  - description of services to be purchased if contracting staff or services;
  - indication of a stipend payment, if funds are paid to an existing LEA staff member for work beyond regular work hours.

Budget Overview

No input is required by the LEA. A summary of the Title I, Part D LEA budgeted amounts is reported by line item and account number. This section is a resource to provide a different view of the budgeted amounts.

Budget Overview Plus/Minus

No input is required by the LEA. A summary of prior approved budgeted amounts is reported by line item and account number with revision amounts displayed in red text. This section is a resource to provide a different view of the budgeted amounts and changes made within the current revision.

Program Details

- **Administration:**
  - If using con admin, check the box to confirm the consolidation of administrative funds. Additional information is not required.

- - If not using con admin, check the box stating that the LEA is not using con admin and provide a description of how the LEA administers the Title I, Part D program, including:
    - Staff responsible for administering the program (titles, no names);
    - Funding sources of each position (state, local, federal, or combination—*if combination*, provide the percentage from each source);
    - FTE of staff identified (must match budget and personnel details pages); and
    - Summary of duties and responsibilities handled by identified staff.
- Provide the name of the facility (facilities) served by the LEA. Be sure to identify the personnel to be hired using Title I, Part D funds.
- Describe the facilities to receive Title I, Part D, Subpart 2 funds. In this section, describe the program details for the facility. *(e.g. This program serves males from ages 12-18, who are adjudicated delinquent and are placed by DCS. Many need counseling for substance abuse. This is a long-term care facility where the average stay is greater than 90 days.)*
- Describe how the Title I, Part D Subpart 2 funds will be used in each facility to support the educational programs for students in the facility. List the intended purchases and the outcomes expected as a result of the purchases. *(e.g. Facility A will purchase a supplemental reading program, Read 180, to increase the reading levels of the students by one grade level.)*
- How does the LEA successfully transition the students returning from facilities to the public schools with the LEA? What supports are offered? Describe the transition process for students leaving the facility to attend public schools. *(e.g. School staff participate in a conference call/meeting to discuss the student's unique needs prior to re-entry into the public schools.)*
- Does the LEA partner with institutions of higher education or local businesses to facilitate postsecondary and workforce success for children and youth returning from facilities? If yes, please explain. *(e.g. These partnerships would include postsecondary opportunities, CTE offerings, mentoring programs, etc.)*
- Describe, as appropriate, how the program involves parents and family members in efforts to improve the educational achievement of their children. Describe any family engagement activities. *(e.g. Facility A hosts a Family Day for all students. Parents attend sessions with their child on academic achievement after transition.)*
- Describe, as appropriate, how the LEA works with probation officers and other professionals to assist in meeting the needs of children and youth returning from facilities.
    - Describe the process for facilitating meetings with the student's probation officers and other professionals *(e.g. DCS, mental health providers)* and any support that you may give as a result of these meetings.
- Describe, as appropriate, how the program finds alternative placements for children and youth interested in continuing their education, but unable to participate in a traditional public school program. Describe how the LEA works with these students to identify alternative placements. *(e.g. Alternative placements include alternative learning centers, credit recovery offerings, adult high school/night school, and HiSET prep courses.)*
- Describe the process and frequency regarding how and when the LEA monitors the facility to ensure compliance with the Title I, Part D program. Describe how the LEA monitors the facility programming with on-site monitoring, not less than once every three years. (This is the minimum requirement. However, also include details about monthly calls, inventory tracking, etc. that occur throughout the year.)

Related Documents

This page allows the LEA to upload additional documentation in support of the *Title I, Part D* application. LEAs receiving Title I, Part D funds must upload the following:

- A signed memorandum of understanding (MOU) or formal agreement for each facility that is served through the Title I, Part D program.
- The needs assessment, completed by each facility on the form provided by the department.

NOTE: Uploading the facility application, contracts, and monitoring tools would be considered a best practice but is not required.

Title I, Part D Program Assurances

By checking the statement at the top of the _Program_ _Assurances_ page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

Important Reminders and the Title I, Part D Checklist

Ensure there is alignment between the needs assessment, the program details, and the budget. For example, if math tutoring is identified in the needs assessment, it must also be listed in the program details question that asks about how funds will be spent, and a tutoring position must be listed in the budget. Conversely, all items listed in the budget must be reflected in the needs assessment and budget details.

Save the page by clicking **Save and Go to > Current Page**, then click **Help for Current Page** in the sidebar for a checklist to determine if the application is ready for submission. If the answers to all the following questions are "yes" and/or "N/A," the application is ready for submission.

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Title II, Part A

Budget

- Budget all funds awarded (minus funds contributed to con admin) using the appropriate function, object code(s), and budget tag(s).
- Provide a budget narrative for each line item within the budget to describe expenditures. If applicable, include the following components in the narratives:
  - Full-time equivalents (FTEs) for all employees of the LEA funded with Title II, Part A funds.
  - If funds are used to support the salary/benefits of class size reduction (CSR) teachers, complete the *Class Size Reduction personnel* page.
  - Titles of positions funded **(not** staff names) beside the corresponding FTE that matches the titles used throughout the application. If funds support a CSR teacher, include CSR in the position title.
  - A breakdown of amounts to be used for Title II, Part A administration, if the LEA is not using con admin (if the LEA is not using con admin, no additional administrative costs may be included in the budget); ***NOTE:*** *Amounts must equal the administrative percentage identified in the ESEA Requirements section.*
  - <u>**Examples of equipment, materials, and supplies purchased, including**</u>:
    - Specific professional development, the number and type of staff who plan to participate (position titles, not employee names), and types of expenses (conference registration, speaker fees, materials, etc.); ***NOTE:*** *Title II, Part A funds may not be used to pay for professional development activities for LEA-level staff.*
    - Description of services purchased if contracting staff or services; and
    - Indication of a stipend payment if funds are paid to an existing LEA staff member for work beyond regular work hours.
  - Any expenditures that are made for equitable services to non-public schools must be clearly labeled as such and must contain examples of what is purchased as specified above.

Program Details

Program Administration: This is a summary of how the LEA plans to administer the Title II, Part A program.
- If **using con admin**, check the box stating that the LEA plans to consolidate funds. This option requires no additional input from the LEA.
- If **not using con admin**, check the box to confirm the LEA is not using con admin and provide a description of how the LEA plans to administer the Title II, Part A program, including:
  - Staff responsible for administering the program (titles, no names);
  - Funding sources of each position (state, local, federal, or combination—*if combination*, provide the percentage from each source);
  - An FTE of staff identified (must match budget and personnel details pages); and
  - A summary of the duties and responsibilities assumed by identified staff.

o   ***NOTE:*** If no Title II, Part A funds support the administration of the program, address the question to demonstrate that the LEA administered Title II, Part A appropriately.

Program Description: Choose the type(s) of activities supported with Title II, Part A from the checkboxes.
- For each area selected, as applicable, enter the number of staff impacted. The count must be a head count, not an FTE. Numbers must quantify the number of staff impacted by the activities supported with Title II, Part A, not the number of staff paid from Title II, Part A.
- For each option selected, provide a concise summary of the activities supported. Information may include conferences or other professional development activities supported, schools and grade levels where the LEA plans to assign CSR teachers, focus areas/schools for coaches and instructional facilitators, and strategies for educator/principal retention. Descriptions must be 200 characters or less and should contain information regarding all expenditures that are outlined in the budget.
- If selecting "Teacher Testing for Hard-to Staff Areas," indicate which areas are impacted using the checkboxes in the section below.
- Describe how the activities supported with Title II, Part A funds **are in support of one or more of the strategies in the LEA plan.** ESSA requires LEAs to align Title II, Part A funds with and use them to support priority needs identified through a comprehensive needs assessment.

Title II, Part A Personnel Details—School-Based and System-Wide

Place all staff in one of three areas: school-based (serves one site), system-wide instruction (serves multiple school sites), or system-wide administration (central office). Personnel details must align to budget details. For each staffing category, several widely used position titles have been prepopulated. Enter any staff not aligned to these categories in the "Other" row and provide a position title. Use the "Add Row" link to add additional "Other" rows to the table to provide information for additional staff. ***NOTE:*** *FTEs* **must** *match FTEs identified in budget narratives (individually and the sum), and titles of staff* **must** *match titles identified within budget narratives.*

- ***School-Based Staff Instruction & Support:*** Enter a head count **and** an FTE for all **school-based** instructional and support staff supported with Title II, Part A funds. School-based staff are *employees who are assigned to one or more schools for a pre-determined amount of time*. These staff may work full time at one school or be split among two or more schools.
- ***System-Wide Instruction & Support:*** Enter a head count **and** an FTE for all **system-wide** instructional and support staff supported with Title II, Part A funds. System-wide staff are *employees who are not assigned to a building*. These staff work across the LEA with multiple school sites and not as part of a planned assignment.
- ***System-Wide Personnel:*** If not using con admin, enter the head count **and** FTE for all system-wide administrative staff. These are personnel generally working out of the central office, handling administrative duties for Title II, Part A (i.e., monitoring, bookkeeping, completing required reports, and the consolidated funding application, etc.).

Class Size Reduction (CSR)

- If the LEA does not plan to use Title II, Part A funds to fund CSR teachers, mark this page "N/A" by checking the box at the top of the page. No additional input is necessary on this page.
- For each school with Title II, Part A funded CSR teachers, complete the information in the chart. ePlan uses the data entered in the chart to auto-calculate the projected state and local teacher to student ratio and the grade span projected state and local teacher to student ratio.
- Describe the LEA's use of funds for Class Size Reduction (CSR), **the evidence upon which the LEA is relying for its use,** and how CSR is in support of one or more of the strategies in the district plan.

- Provide answers to the remaining multiple-choice questions.
- **In September of the school year**, a second chart will appear on this page. When available, complete the chart. ePlan uses the data entered in the chart to auto-calculate (1) the projected state and local teacher to student ratio and (2) the grade span projected state and local teacher to student ratio.

Related Documents

No documents are required in this section. LEAs may upload any additional supporting documents, as applicable.

Title II, Part A Program Assurances

By checking the statement at the top of the _Program_ _Assurances_ page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

Title II, Part A Checklist

Save the page by clicking **Save and Go to > Current Page**, then click **Help for Current Page** in the sidebar for a checklist to determine if the application is ready for submission. If the answers to all the following questions are "yes" and/or "N/A," the application is ready for submission.

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English Learner Requirements

All LEAs must complete the *English Learner Requirements* section to identify whether it accepts Title III, Part A or to indicate that the LEA receives no Title III, Part A funds. This section also requires each LEA to answer specific questions surrounding funding and required services for English learners (ELs).

Program Details

- Select the option that describes the Title III, Part A status. Of the five options provided, the LEA **must** select one. *All LEAs must complete this page even if releasing or not generating Title III, Part A funds.*
  - o **LEA generates $10,000 or more:** LEAs that generate at least $10,000 in Title III, Part A in a given fiscal year may choose to keep the funds and operate a Title III, Part A program as a stand-alone system (not a member of a consortium). The selection of this option requires the LEA to complete the *Title III, Part A* section that follows the *English Learner Requirements* section.
  - o **LEA will act as the Fiscal Agent for other LEAs:** LEAs that receive less than $10,000 in Title III, Part A in a given fiscal year must enter a consortium to access funds. LEAs may choose to be the lead fiscal agent of a consortium and manage the Title III, Part A funds of all other members of the consortium. By checking this option, the LEA retains its Title III, Part A allocation **and** has consortium members' Title III, Part A funds added to the Title III, Part A allocation before the final revisions are completed. The LEA in the lead fiscal agent role must complete the *Title III, Part A* section and budget the total amount of Title III, Part A funds received (LEA allocation + consortium member allocations).
  - o **LEA does _not_ generate at least $10,000 and will join a consortium:** LEAs that receive less than $10,000 in Title III, Part A and do **not** serve as the lead fiscal agent for a consortium must join a consortium to access allocated Title III, Part A funds. LEAs in a consortium must complete all narratives related to Title III, Part A, and budget the total amount of Title III, Part A funds received. This budget information must be completed on the *Consortia Budget Review* page. LEAs that join a consortium must provide a budget to the lead fiscal agent for the consortium upon each approved revision.
  - o **LEA is releasing __all__ generated Title III, Part A funds:** LEAs have the option not to accept Title III, Part A, regardless of the amount. If an LEA selects this option, it releases the Title III, Part A allocation, and the funds become available as part of future Title III, Part A reallocations. The LEA is **not** required to complete the *Title III, Part A* section but must complete the *English Learner Requirements* section.
  - o **LEA does not receive __any__ Title III, Part A funds:** LEAs that have not generated a Title III, Part A allocation must choose this option. LEAs must only select this option if the LEA does not generate a Title III, Part A allocation, not if the LEA is releasing generated funds. The LEA is **not** required to complete the *Title III, Part A* section but must complete the *English Learner Requirements* section.
- Complete the LEA- wide ESL Program Staffing Area:

- o Enter the total number of full-time equivalent certified English as a Second Language (ESL) staff, funded from state and local funds and providing ESL services to ELs. This number must be as of Oct. 1, 2020.
  - o ePlan prepopulates the number of ELs with students coded as "L," "W," "T1," and "T2." based on Oct. 1, 2020, counts. The staff-to-student ratio must be equal to or less than 1:35 (Oct. 1, 2020 student count divided by the number of state and locally funded ESL staff as of Oct. 1, 2020). The information used to determine the staff/student ratio for ESL is based on Oct. 1, 2020 staff and student counts. If these counts have significantly changed since that time (more than a 10 percent change either up or down), the LEA must describe the changes and the steps taken to ensure continued compliance with the state staff-to-student ratio requirements.
- Complete the area pertaining to identification and enrollment.
  - o Select "yes" or "no" from the dropdown item regarding Home Language Surveys.
  - o Review the associated assurance. By checking the statement beneath the dropdown menus, the LEA is affirming that it has read, understands, and affirms its accuracy.
- Complete each question for providing equitable access to programs and services for ELs.
  - o Enter the number of EL grade-level retentions for the prior school year—upload the current number and explanation for each retention to the **LEA Document Library** by July 15, 2021.
  - o Enter the number of ELs and non-ELs in the gifted program, AP honors program, and those identified for special education. ePlan automatically determines the percentage of participation or identification of each group.
  - o If the data provided and calculated in the chart does not show equitable participation, explain the LEA's actions to remedy the inequitable participation.
  - o Indicate if the LEA has any current Office of Civil Rights or Department of Justice investigations (concerning ELs). If yes, describe the investigation and include the date of filing, the subject matter, and the status.
- Complete the narrative questions about the LEA's ESL program and translation and interpretation services.

The second portion of this page is required only for those LEAs that choose to accept Title III, Part A as a **stand-alone** LEA, a **fiscal agent**, or as a Title III, Part A **consortium member**. If required, LEAs must provide information regarding the type of language instruction program provided, and the professional development activities supported by Title III, Part A funds in the prior year.

- In the table, place a check next to each type of language instruction educational program (LIEP) in the schools within the LEA. Indicate "N/A" in the comments area if there are no English Learners in a school. Identify the methods for providing language instruction to ELs for each school within the LEA. LEAs may select more than one program if multiple language instruction methods are utilized. For additional explanations, please provide a written explanation in the Comments column. All schools must have either program type(s) indicated or "N/A" specified in the Comments column. To add a school, use the "add-a-row" option.
- Select from the list of professional development options all activities completed by the LEA in the 2020-21 academic year.

Consortia Budget Review

- The budget portion of this section is only required for LEAs participating as Title III, Part A **consortium members**. For LEAs that choose to accept Title III, Part A as a **stand-alone**, a **fiscal agent**, or are **releasing** or **do not generate** Title III, Part A funds, check the box at the top of the page indicating that the section is "N/A."

- For each line item in the budget, select from the corresponding drop-down menu. Once the line item is selected, type the budgeted amount in the *Amount* box and complete the *Narrative Description*. This must be repeated for each line item of the Title III, Part A budget.
- For additional line items within a budget category select *Add Row*.
- To delete a line item within a budget category, click on the trash can icon.

The entire Title III, Part A allocation must be budgeted.

EL OCR Assurances

LEAs must review all program assurances thoroughly. All items specified are requirements of federal legislation or regulation. By checking the statement at the top of the page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

Program Details—Title III

- If the LEA is using con admin, check the box indicating that the LEA will consolidate funds. No other information is needed regarding program administration.
- If not using con admin, check the box stating that the LEA is not using con admin and provide descriptions of how the Title III, Part A program is to be administered, including:
  - o Staff responsible for administering the program (title, no names);
  - o Funding sources of each position (state, local, federal, or combination—if combination, provide the percentage from each source);
  - o A full-time equivalent (FTE) of staff identified (must match budget and personnel details pages); and
  - o Summary of duties and responsibilities to be handled by identified staff.

NOTE: Even if the LEA does not plan to use Title III, Part A to support the administration of the program, the LEA must address this question to demonstrate that it appropriately administers Title III, Part A.

- Complete the narrative questions about the LEA's Title III program.
- If the LEA is participating in equitable services for Title III, complete the narrative questions related to non-public/private schools in the Equitable Services to Non-Public/Private Schools section of the application.

Personnel Details—School-Based and System-Wide

Place all staff in one of three areas: school-based (serves one site), system-wide instruction (serves multiple school sites), or system-wide administration (central office). Personnel details must align to budget details. For each category, several widely used position titles have been prepopulated. Enter staff not aligned to these prepopulated titles in the "Other" row and provide a position title. Use the "Add Row" link to add additional rows to the table to provide information for additional staff. ***NOTE:*** *FTEs* **must** *match FTEs identified in budget narratives (individually and the sum), and titles of staff* **must** *match titles identified within budget narratives.*

- ***School-Based Staff Instruction & Support:*** Enter a head count **and** FTE for all **school-based** instructional and support staff funded with Title III, Part A. School-based staff are employees assigned to one or more schools for a pre-determined time. Staff may work full-time at one school or split among two or more schools.
- ***System-Wide Instruction & Support:*** Enter both a head count and an FTE for all **system-wide** instructional and support staff supported with Title III, Part A funds. System-wide staff are employees not assigned to a building. These staff members work across the LEA with multiple school sites as necessary, not as part of a planned assignment.

- **System-Wide Personnel**: If not utilizing con admin, enter the head count and FTE for all system-wide administrative staff. These are personnel generally working out of the central office, handling administrative duties for Title III, Part A (i.e., monitoring, bookkeeping, completing required reports, and the consolidated funding application, etc.).
- For all three staffing categories, several widely used position titles have been prepopulated. Enter any staff not falling into these prepopulated categories in the "Other" line and provide a position title.

Related Documents

- **All LEAs must upload the following Required Documents**:
    - o the LEA's *Home Language Survey* used at registration.
    - o the *Transitional Student Monitoring Form* used to monitor T1 and T2 students.
    - o the LEA's annual *ESL Program Self-Assessment*. LEA's are required to complete an annual ESL program self-assessment.
    - o the LEA's *ESL teacher hiring plan*. LEAs may provide a link to a publicly posted hiring plan. All LEAs must be prepared to hire ESL teachers and evaluate language skills across the four domains (reading, writing, speaking, listening), even if there are no currently enrolled ELs.
    - o the LEAs *Immigrant Identification Procedure*
    - o an English learner program self-assessment. **NOTE:** *Two optional templates are provided to aid LEAs with this requirement: TELDSA Data Collection Document and TELDSA Change Map. LEAs must upload a self-assessment document, but are not required to use these forms.(Castañeda vs. Pickard, 1981).*
- **LEAs serving as fiscal agents for a Title III, Part A consortium** must upload the memorandum of understanding (MOU) used between the fiscal agent and member LEAs in the consortium. Additional information is included in the Title III, Part A consortia webinar.

The *Related Documents* page includes an optional "Additional Supporting Document(s)" category for support that does not fall into the categories provided (e.g., waiver of the EL 1:35 ratio letter).

English Learner Program Assurances

By checking the statement at the top of the *Program Assurances* page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

English Learner Requirements Checklist

Save the page by clicking **Save and Go to > Current Page**, then click **Help for Current Page** in the sidebar for a checklist to determine if the application is ready for submission. If the answers to all the following questions are "yes" and/or "N/A," the application is ready for submission.

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Title III, Part A

Budget

Title III, Part A activities must be supplemental to supports and services provided with federal, state, and local resources. For guidance see the Allowability Guide and Allowability Scenarios.

- Budget funds (minus con admin funds) using the appropriate function, object code(s), and budget tag(s).
- Provide narratives for each budget line item to explain expenditures. Include, if applicable:
  - Full-time equivalents (FTEs) and position title (**not** names) for all LEA employees funded with Title III, Part A funds. Use consistent titles throughout the CFA.
  - Administration amounts, if the LEA is not using con admin (if the LEA is using con admin, do not include additional administrative costs in the budget). LEAs may use no more than two percent of Title III, Part A funds for administrative activities;
  - Amounts equal to the administrative percentage identified on the *ESEA Administration* page
  - Examples of equipment, materials, and supplies to fund;
  - Specific professional development, the number and type of staff who plan to participate (position titles, not employee names), and expenses to pay;
  - Description of services to purchase (if contracting staff or services);
  - Indication of stipend payments, if funds pay existing LEA staff beyond regular work hours; and
  - Any expenditures labeled for equitable services to non-public school students.

Budget Overview

No input is required by the LEA. A summary of the Title III, Part A LEA budgeted amounts is reported by line item and account number. This section is a resource to provide a different view of the budgeted amounts.

Title III, Title III Consortium, and English Learner Requirements Checklist

Click **Save and Go to > Current Page**, then click **Help for Current Page** in the sidebar for a checklist to determine if the application is ready for submission. If all answers are "yes" and/or "N/A," the application is ready for submission. See the table below to determine which sections to complete for each LEA Type.

LEA Type	English Learner Requirements	Title III	Consortia Budget Review*
Stand Alone (generates $10,000 + and retains)	✔	✔	
Fiscal Agent for a Title III, Part A consortium	✔	✔	
joins a Title III, Part A consortium	✔		✔
releases Title III, Part A Funds	✔		
No Title III, Part A Funds generated	✔		

*_Consortia Budget Review_ Page in the *English Learner Requirements* section

Title IV, Part A

Budget

- Budget all funds (minus funds contributed to con admin) in the appropriate function, object code(s), and budget tag.

Budget tags assist LEAs in tracking Title IV spending and help ensure that all spending requirements, including carryover requirements, are met. **Use only one budget tag per line item number entry** to take advantage of the full functionality of the "Filtering" feature at the top of the *Budget* page. Refer to "Budget Tags" in this guide for more information. Title IV, Part A budget tags include:
- Well-Rounded Educational Opportunities
- Safe and Healthy Students
- Effective Use of Technology

- Ensure that the amounts listed in the budget for each focus area align with the amounts listed on the *Program Details* page for each focus area.
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures.
- Budget narratives must include, if applicable:
  o Full-time equivalents (FTEs) and position titles (**not** names) for all LEA employees funded with Title IV, Part A funds (use consistent titles throughout the CFA);
  o Amounts used for Title IV, Part A administration, if the LEA is not using con admin (if the LEA is using con admin, no additional administrative costs may be included in the budget); *NOTE: Amounts must equal the administrative percentage identified in the ESEA Requirements section.*
  o Examples of equipment, materials, and supplies to be purchased, including:
    ▪ Specific professional development, the number and type of staff who plan to participate (position titles, not employee names), and types of expenses (conference registration, speaker fees, materials, etc.);
    ▪ Description of services purchased if contracting staff or services; and/or
    ▪ Indication of a stipend payment if funds are paid to an existing LEA staff member for work beyond regular work hours.
  o Any expenditures that are made for equitable services to non-public schools must be clearly labeled as such and must contain examples of what is to be purchased as specified above.

Budget Overview

No input is required by the LEA. A summary of the Title IV, Part A LEA budgeted amounts is reported by line item and account number. This section is a resource to provide a different view of the budgeted amounts.

Program Details

Program Administration*:* This is a summary of how the LEA plans to administer the Title IV, Part A program.

- If **using con admin**, check the box stating that administrative funds are consolidated. No additional information is needed.
- If **not using con admin**, check the box to confirm that the LEA is not using con admin. Describe how the Title IV, Part A program is to be administered, including:
  - Staff responsible for administering the program (titles, no names);
  - Funding sources of each position (state, local, federal, or combination—*if combination*, provide the percentage from each source);
  - An FTE of staff identified (must match budget and personnel details pages); and
  - Summary of duties and responsibilities to be handled by identified staff.
- If no Title IV, Part A funds are used to support the administration of the program, address the question to demonstrate that Title IV, Part A is appropriately administered.

Program Description: Check the box next to each focus area to identify which focus areas are supported with Title IV, Part A funds. If the LEA receives $30,000 or more in Title IV, Part A funding, all three focus areas must be supported.

- Well-Rounded Educational Opportunities: If the LEA receives $30,000 or more in Title IV, Part A funds, a minimum of 20 percent of grant funds must be spent on this focus area.
- Safe and Healthy Students: If the LEA receives $30,000 or more in Title IV, Part A funds, a minimum of 20 percent of grant funds must be spent on this focus area.
- Effective Use of Technology: If the LEA receives $30,000 or more in Title IV, Part A funds, it must spend a portion of grant funds on this focus area. **Regardless of the Title IV, Part A allocation amount, no more than 15 percent of the amount spent on this focus area may be used to support technology infrastructure.** *NOTE:* *Technology infrastructure includes devices, equipment, software applications, platforms, digital instructional resources, and/or other one-time IT purchases.* If the LEA receives less than $30,000, it must support at least one focus area, with no minimum spending requirements. The 15 percent cap on technology infrastructure in the effective use of technology area still applies.
- Enter the amount of funds to be spent in each focus area (as applicable).
- In the *Effective Use of Technology* area, indicate if funds will be used to support technology. If yes, enter the amount to be spent.
- For each focus area funded, complete each of the open response questions. Responses within each focus area must include: (1) an explanation of how the proposed use of funds relates to priority needs determined in the LEA needs assessment, (2) any partnerships with outside organizations, and (3) how the effectiveness of the activities will be assessed.

Distribution of Funds: Using the checkboxes, select one or more priorities the LEA will use in distributing Title IV, Part A funds.

Assurances: By checking the box, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

Personnel Details—School-Based and System-Wide

Place all staff in one of three areas: school-based (one site), system-wide instruction (serves multiple school sites), or system-wide administration (central office). Personnel details must align to budget details. For all three staffing categories, several widely used position titles have been prepopulated. Enter any staff not

aligned to these prepopulated categories in the "Other" row and provide a position title. Use the "Add Row" link to add additional "Other" rows to the table to provide information for additional staff.

NOTE: *FTEs **must** match FTEs identified in budget narratives (individually and the sum), and titles of staff **must** match titles identified within budget narratives.*

- ***School-Based Staff Instruction & Support:*** Enter both a head count and an FTE for all **school-based** instructional and support staff supported with Title IV, Part A funds. School-based staff are employees who are assigned to one or more schools for a pre-determined amount of time. These staff may work full time at one school, or staff may be split among two or more schools.
- ***System-Wide Instruction & Support:*** Enter both a head count and an FTE for all **system-wide** instructional and support staff supported with Title IV, Part A funds. System-Wide staff are employees who are not assigned to a building. These staff members work across the LEA with multiple school sites as necessary, not as part of a planned assignment.
- ***System-Wide Personnel:*** If not utilizing con admin, enter the head count and FTE for all system-wide administrative staff. These are personnel generally working out of the central office, handling administrative duties for Title IV, Part A (i.e., monitoring, bookkeeping, completing required reports, and the consolidated funding application, etc.).

Related Documents

No documents are required in this section. LEAs may upload any additional supporting documents, as applicable.

Title IV, Part A Program Assurances

By checking the statement at the top of the *Program Assurances* page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

Title IV, Part A Checklist

Save the page by clicking **Save and Go to > Current Page**, then click **Help for Current Page** in the sidebar for a checklist to determine if the application is ready for submission. If the answers to all the following questions are "yes" and/or "N/A," the application is ready for submission.

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Title V, Part B, Subpart 2

Budget

- Budget all funds awarded (minus funds contributed to con admin) using the appropriate function, object code(s), and budget tag.

Budget tags assist LEAs in tracking Title V, Part B spending and help ensure that all spending requirements, including carryover requirements, are met. **Use only one budget tag per line item number entry** to take advantage of the full functionality of the "Filtering" feature at the top of the *Budget* page. Refer to "Budget Tags" in this guide for more information. Title V, Part B budget tags include:

- Title I, Part A
- Title II, Part A
- Title III, Part A
- Title IV, Part A
- Parent and Family Engagement
- Title IV, Part A: Well-Rounded Educational Activities
- Title IV, Part A: Effective Use of Technology
- Title IV, Part A: Safe and Healthy

- Ensure that the amounts listed in the budget for each focus area align with the amounts listed on the *Program Details* page for each focus area.
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures.
- Budget narratives must include, if applicable:
  - Full-time equivalents (FTEs) for all employees of the LEA to fund with Title V, Part B funds;
  - Titles of positions (not names) to fund, listed with the corresponding FTE that matches the titles used throughout the application; If funds are used to support a class size reduction teacher, include "CSR" in the position title, and complete the *Class Size Reduction personnel* page; do not use generic titles such as "teacher" when identifying positions.
  - A breakdown of amounts used for Title V, Part B administration, if the LEA is not using con admin (if the LEA is using con admin, no additional administrative costs may be included in the budget);
  - Any expenditures listed for program administration must equal the administrative percentage on the ESEA Requirements section;
- Examples of equipment, materials, and supplies funded, including
  - A description of any specific professional development funded, including names of conferences and trainings supported, the number and type of staff impacted, and details about what purchases are for professional development (registration, travel, professional development [PD] materials, etc.), who plans to participate (position titles, not employee names), and expenses to pay;
  - A description of services to purchase if contracting staff or services;

- An indication of a stipend payment, if funds are paid to an existing LEA staff member for work beyond regular work hours; and

Budget Overview

No input is required by the LEA. A summary of the Title III, Part A LEA budgeted amounts is reported by line item and account number. This section is a resource to provide a different view of the budgeted amounts.

Program Details

Program Administration*:* This is a summary of how the LEA plans to administer Title V.
- If **using con admin**, check the box stating that the LEA is consolidating administrative funds. No additional information is needed.
- If **not using con admin**, check the box to confirm the LEA is not using con admin and provide a description of how Title V is to be administered, including:
  - Staff responsible for administering the program (titles, no names);
  - Funding sources of each position (state, local, federal, or combination—*if combination*, provide the percentage from each source);
  - An FTE of staff identified (must match budget and personnel details pages); and
  - A summary of duties and responsibilities to be handled by identified staff.
- If no Title V funds are used to support the administration of the program, address the question to demonstrate that Title IV, Part A is appropriately administered.

- Place a checkmark beside each of the programs supported by Title V, Part B, Subpart 2 funds the school year. Title V, Part B, Subpart 2 may be used for activities authorized under several other ESEA programs, including:
  - Title I, Part A
  - Title II, Part A
  - Title III, Part A
  - Title IV, Part A **NOTE:** *If more than $30,000 is placed in this area, all Title IV, Part A spending rules apply.*
  - Parent and Family Engagement for non-Title I schools **NOTE:** *If the LEA is utilizing Title V, Part B, Subpart 2 for parent and family engagement at schoolwide Title I schools, those activities must be noted under Title I, Part A. Only parent and family engagement activities at non-Title I schools must be noted here.*
- For each program selected, provide a clear narrative description of the activities, programs, and services to be funded, and the district plan strategy these activities support.
- For activities authorized under **Title III**, describe the above. Include a clear narrative description of how Title III purchases are *supplemental* to all other local, state, and federal funds.
- For activities authorized under **Title IV, Part A**, describe the above. Describe any partnerships with outside organizations, and how the effectiveness of activities will be assessed.
  *NOTE: If **more than $30,000** is placed in this area, check the box and provide a breakdown of how much will be spent in the three Title IV, Part A focus areas: Well-Rounded Educational Opportunities, Safe & Healthy Students, and the Effective Use of Technology.*

Personnel Details—School-Based and System-Wide

Place all staff in one of three areas: school-based (serves one site), system-wide instruction (serves multiple school sites), or system-wide administration (central office). Personnel details must align to budget details. For all three staffing categories, several widely used position titles have been prepopulated. Enter any staff

not aligned to these prepopulated categories in the "Other" row and provide a position title. Use the "Add Row" link to add additional rows to the table to provide information for additional staff.

NOTE: FTEs **must** *match FTEs identified in budget narratives (individually and the sum), and titles of staff* **must** *match titles identified within budget narratives.*

- *School-Based Staff Instruction & Support:* Enter both a head count and an FTE for all **school-based** instructional and support staff supported with Title V, Part B, Subpart 2 funds. School-based staff are employees who are assigned to one or more schools for a pre-determined amount of time. These staff may work full time at one school, or staff may be split among two or more schools.
- *System-Wide Instruction & Support:* Enter both a head count and an FTE for all **system-wide** instructional and support staff supported with Title V, Part B, Subpart 2 funds. System-wide staff are employees who are not assigned to a building. These staff members work across the LEA with multiple school sites as necessary, not as part of a planned assignment.
- *System-Wide Personnel:* If not utilizing con admin, enter the head count and FTE for all system-wide administrative staff. These are personnel generally working out of the central office, handling administrative duties for Title V, Part B, Subpart 2 (i.e., monitoring, bookkeeping, completing required reports, and the consolidated funding application, etc.).

Class Size Reduction

- If the LEA does not plan to use Title V, Part B funds to fund CSR teachers, mark this page "N/A" by checking the box at the top of the page. No additional input is necessary on this page.
- If the LEA plans to use Title V, Part B funds authorized under **Title I, Part A** or **Title II, Part A** for CSR teachers, complete the *Class Size Reduction* page.
- For each school with Title V, Part B funded CSR teachers, complete the information in the table. ePlan uses the data entered in the table to auto-calculate the projected state and local teacher to student ratio and the grade span projected state and local teacher to student ratio.
- Describe the LEA's use of funds for Class Size Reduction (CSR), **the evidence upon which the LEA is relying for its use,** and how CSR is in support of one or more of the strategies in the district plan.
- Answer the remaining multiple-choice questions.

In September of the school year, a second chart will appear on this page. When available, complete the chart. ePlan uses the data entered in the chart to auto-calculate (1) the projected state and local teacher to student ratio and (2) the grade span projected state and local teacher to student ratio.

Related Documents

No documents are required in this section. LEAs may upload any additional supporting documents, as applicable.

Title V Program Assurances

By checking the statement at the top of the *Program Assurances* page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

Title V, Part B, Subpart 2 Checklist

Save the page by clicking **Save and Go to > Current Page**, then click Help for Current Page in the sidebar for a checklist to determine if the application is ready for submission. If the answers to all the following questions are "yes" and/or "N/A," the application is ready for submission.

Equitable Services for Non-Public Schools

Non-Public/Private Schools

The Non-Public/Private Schools page provides a summary of the non-public/private schools that participate in equitable services for students with federal grant programs received by the LEA. ePlan pre-populates this page with data from the current year's *Non-Public School Survey*. Each LEA must survey the non-public/private schools within its boundary; additionally, in the case of Title I, Part A eligibility, LEAs must survey non-public/private schools where students residing within the LEA Title I attendance areas are enrolled. LEAs complete the *Non-Public School Survey* in ePlan under **Application Supplements** each year.

Equitable Services Program Details— Title I, Part A

If there are no non-public schools within the LEA and no known low-income students from the LEA's Title I attendance areas enrolled in participating non-public schools, mark the checkbox to indicate the page is not applicable.

The equitable share of Title I, Part A funds for non-public/private school services must be determined based on the proportionate share of low-income students attending participating non-public schools and must be determined before any funds are set aside or transferred.

A. Total Non-Public Share: This amount is auto-calculated based on the proportionate share of non-public, low-income students in participating non-public schools. The **numerator**, K-12 non-public low-income enrollment, is the total of column K on the *School Eligibility* page. The **denominator,** K-12 total low-income enrollment, is the non-public low-income total (Column K, *School Eligibility* page) plus (+) the total public low income in Title I participating schools (Column E, *PPA List* page).

B. Non-Public Family Engagement: This amount is auto-calculated based on the proportionate share of non-public, low-income students in participating non-public schools. The field is only populated if the LEA is required to spend one percent of Title I funds on family engagement. ***NOTE:*** *This amount must be manually entered in the* **District Set-Asides and Overview** *page. For LEAs that are not required to set aside one percent for family engagement, this number (B.) is not required.*

C. Non-Public Administration: *This amount does* **not** *auto-calculate and requires entry.* During consultation with non-public school officials, the LEA must discuss and agree upon the amount of the equitable share used for program administration. Enter the total agreed-upon amount here (if there are multiple non-public schools, combine all administration costs). ***NOTE:*** *The amount of administrative costs for non-public school services* **must** *be included in the amount transferred to con admin* **or** *the amount entered on the* **Allocation Designation** *page if not consolidating administrative funds.*

D. FY21 Non-Public Instructional Funds (A-(B+C)): ePlan auto-calculates this amount by subtracting the family engagement amount and the administration amount from the total equitable share. The remaining amount displayed on this line is the Non-Public/Private Schools Instructional Funds to provide instructional

services and programs to participating non-public school students from **current fiscal year** funds. **This amount must also be entered in the *District Set-Asides and Overview* page.**

E. FY20 Non-Public Carryover Amount: *The LEA must calculate this amount and enter it.* The amount entered must be the amount of FY20 Title I funds set-aside for equitable services that *will not be obligated by July 1, 2021*. LEAs must carry over these remaining funds and add them to the FY21 funds for equitable services.

F. Total Amount of Non-Public Instructional Funds (FY20 Carryover and FY21): ePlan calculates this number by adding the rows D and E. The amount displayed is the total amount of Title I funds available to provide instructional services and programs to participating non-public schools. ***NOTE:*** *LEAs must enter this amount on the District Set-Aside page on the Non-Public/Private School Instructional Funds line once the LEA completes the final expenditure report (FER) for FY20 and final allocation revisions are processed.*

Title I, Part A Narrative Questions

- Describe the consultation process between the LEA and the non-public/private school(s). Include **(1)** important dates, **(2)** modes of communication, and **(3)** the information provided to non-public/private school representatives. (Upload *Affirmation of Consultation(s)* on the <u>Related Documents</u> page.) ***NOTE:*** *LEAs must upload the completed* **Affirmation of Meaningful Private School Consultation and Agreement Form** *to the* <u>Related Documents</u> *page.*
- Select the services to provide to support the academic achievement of non-public students.
- Indicate if an inter-LEA agreement/Memorandum of Understanding was developed to provide identified services. If yes, indicate which LEA(s) are to provide services.
- Describe the LEA's process for evaluating the effectiveness of the services.
- Describe both the required and additional family engagement activities that are supported with funds set aside for equitable non-public school services. If the LEA is required to set aside one percent for family engagement, describe how the required amount is used to support non-public school family engagement. If the LEA is ***not required*** to set aside one percent of funds, and no funds are used for family engagement activities, indicate that here.

Equitable Services Program Details—Title I, Part C

If there are no non-public schools in the LEA, check the box indicating that this page is not applicable. No more information is needed on this page.

If the LEA has non-public schools participating in Title I, Part C complete this area. The equitable share of Title I, Part C funds for non-public school services must be determined based on a per-pupil share. The per-pupil share is determined based on the number of migratory children and youth enrolled in the LEA and in participating non-public schools that are geographically located within the LEA. This area calculates the equitable share.

A. Number of Students:
A1: Enter the total number of public school migratory children and youth enrolled in the LEA. This is typically pulled from the Oct. 1 count.
A2: ePlan prepopulates the number of LEA-identified migratory children and youth enrolled in participating non-public/private schools. Enter the enrollment of only non-public/private schools that are participating in Title I, Part C Equitable Services.
A3: ePlan auto-calculates the value in this row by adding the previous two rows together.

B. Title I, Part C
B1: ePlan prepopulates this amount from the ***Title I, Part C Allocations*** page. Only the current fiscal year allocation is included.

B2: Enter the administrative costs paid with Title I, Part C funds. This amount must include public and non-public school administrative costs. ***NOTE:*** *If the LEA is utilizing con admin, the amount entered here **must** match the amount contributed from Title I, Part C, displayed on the **Title I, Part C Allocations** page.*

B3: ePlan auto-calculates the total amount of Title I, Part C available for equitable services. (The LEA Allocation minus administrative costs for the public and non-public Title I, Part C program.)

C. Per Pupil Rate:

C1: ePlan auto-calculates the per-pupil amount available for each enrolled migratory student and then uses that per pupil to calculate and display the total amount of the current year.

D. Equitable Services:

D1: ePlan auto-calculates the Title I, Part C funds that must be reserved for non-public/private school services from values in Rows A2 and C1.

E. FY21 Non-Public Carryover Amount: The LEA must calculate this amount and enter it. The amount entered must be the amount of FY21 Title I, Part C funds set-aside for equitable services *that will not be obligated by July 1, 2022*. LEAs must carry over these remaining funds and add them to the FY22 funds for equitable services. ***NOTE:*** *In FY22, there is no carryover for Title I, Part C. Enter "0" in this field.*

F. Total Amount of Non-Public Instructional Funds (FY21 Carryover and FY22): ePlan auto-calculates this amount by adding rows D and E. The amount displayed is the total amount of Title I, Part C funding available to provide instructional services and programs to participating non-public schools.

NOTE: *LEAs must enter this amount on the District Set-Aside page on the Non-Public Private School Instructional Funds line once the LEA completes the final expenditure report (FER) for FY21 and final allocation revisions are processed.*

Narrative Questions

- Describe the consultation process between the LEA and the non-public/private school(s). Include (1) important dates, (2) modes of communication, and (3) the information provided to non-public/private school representatives. (Upload affirmation of consultation(s) on the *Related Documents* page.)
- Describe the process for identifying migratory children and youth at the non-public school(s) that receive(s) Title I, Part C services.
- Describe the process the LEA uses to complete the Individual Needs Assessment (INA) at the non-public school(s) that receive(s) Title I, Part C services.
- Explain how the LEA assesses the Migrant Education Program annually at each non-public school that receives Title I, Part C services.
- Briefly explain what services the LEA provides to eligible migratory children and youth at each non-public school receiving Title I, Part C services (including, but not limited to, professional development, materials, tutoring, and equipment).

Equitable Services Program Details—Title II, Part A

If there are no non-public schools in the LEA, check the box indicating that this page is not applicable. No more information is needed on this page.

The equitable share of Title II, Part A funds for non-public/private school services must be determined based on the enrollment within the LEA and the participating non-public school enrollment before any funds are set aside or transferred.

A. Number of Students: This area auto-calculates from the *School Eligibility* page and *Non-Public School Survey* responses from the spring.

B. Title II, Part A: This amount calculates based on the district allocation for Title II, Part A funds minus the administration costs. Enter the total agreed-upon amount for Title II, Part A administration costs for public and non-public/private school programs in **B2** (if there are multiple non-public schools, combine all administration costs).

C. Per Pupil Rate: ePlan auto-calculates this amount by dividing **B3** by **A3**.

D. Equitable Services: ePlan auto-calculates this amount by multiplying the enrollment of all participating non-public schools by the per-pupil rate.

E. FY20 Non-Public Carryover Amount: The LEA must calculate this amount and enter it. The amount entered must be the amount of FY20 Title I funds set-aside for equitable services **that will not be obligated by July 1, 2021**. LEAs must carry over these remaining funds and add them to the FY21 funds for equitable services.

F. Total Amount of Non-Public Instructional Funds (FY20 Carryover and FY21): This amount auto-calculates by adding rows D and E. The amount displayed is the total amount of Title II funding available to provide instructional services and programs to participating non-public schools. ***NOTE:*** *LEAs must enter this amount on the District Set-Aside page on the Non-Public/Private School Instructional Funds line once the LEA completes the final expenditure report (FER) for FY20 and final allocation revisions are processed.*

Narrative Questions

- Describe the consultation process between the LEA and the non-public/private school(s). Include **(1)** important dates, **(2)** modes of communication, and **(3)** the information provided to non-public/private school representatives. ***NOTE:*** *LEAs must upload the completed **Affirmation of Meaningful Private School Consultation and Agreement Form** on the Related Documents page.*
- Describe the professional development activities to be provided to participating non-public school teachers, principals, and other school leaders.

Equitable Services Program Details—Title III, Part A

Complete this page if the LEA has participating non-public/private schools in Title III, Part A. The equitable share of Title III, Part A funds for non-public/private school services must be determined based on a per-pupil share, much like Title II. The per-pupil share is determined based on the number of English learners enrolled in the LEA and in participating non-public schools that are geographically located within the LEA. This area calculates the equitable share.

A. Number of Students:
A1: Enter the total number of public school English learners enrolled in the LEA. This typically is pulled from the third-month average daily membership (ADM).
A2: ePlan prepopulates the number of LEA-identified English learners enrolled in participating non-public/private schools from the *Non-Public School Survey* completed in spring.
A3: ePlan auto-calculates the value in this row by adding the previous two rows together.

B. Title III:
B1: This count is prepopulated from the **Title III Allocations** page. Only the current fiscal year allocation is included.
B2: Enter the administrative costs paid with Title III, Part A funds. This amount must include public and non-public school administrative costs. ***NOTE:*** *If the LEA is utilizing con admin, the amount entered here* **must** *match the amount contributed from Title III, displayed on the **Title III Allocations** page.*

B3: ePlan auto-calculates the total amount of Title III, Part A available for equitable services. (The LEA allocation minus administrative costs for the public and non-public Title III, Part A program.)

C. Per Pupil Rate:
C1: ePlan auto-calculates the per-pupil amount available for every enrolled EL student.

D. Equitable Services:
D1: ePlan auto-calculates the Title III, Part A funds that must be reserved for non-public/private school services.

E. FY20 Non-Public Carryover Amount: The LEA must calculate this amount and enter it. The amount entered must be the amount of FY20 Title I funds set-aside for equitable services *that will not be obligated by July 1, 2021*. LEAs must carry over these remaining funds and add them to the FY21 funds for equitable services.

F. Total Amount of Non-Public Instructional Funds (FY20 Carryover and FY21): This amount is auto-calculated by adding rows D and E. The amount displayed is the total amount of Title II funding available to provide instructional services and programs to participating non-public schools. ***NOTE:*** *LEAs must enter this amount on the District Set-Aside page on the Non-Public/Private School Instructional Funds line once the LEA completes the final expenditure report (FER) for FY20 and final allocation revisions are processed.*

Narrative Questions

- Describe the consultation process between the LEA and the non-public/private school(s). Include **(1)** important dates, **(2)** modes of communication, and **(3)** the information provided to non-public/private school representatives. (Upload affirmation of consultation(s) on the *Related Documents* page)
- Describe the process for identifying English Learners at the non-public school(s) that receive(s) Title III services.
- Briefly explain how Title III services are provided at each non-public school that receives Title III services (including professional development, materials, tutoring, and equipment).
- Explain how the English as a Second Language program is assessed annually at each non-public school that receives Title III services.

Equitable Services Program Details—Title IV, Part A

The equitable share of Title IV, Part A funds for non-public/private school services must be determined based on a per-pupil share, much like Titles II and III. The per-pupil share is determined based on the number of students enrolled in the public school and in participating non-public schools that are geographically located within the LEA. This area calculates the equitable share.

A. Number of Students: This area is auto-calculated based on the information from the *School Eligibility* page and *Spring Non-Public School Survey*.

B. Title IV, Part A:
B1: This count prepopulates from the *Title IV Allocations* page. Only the current fiscal year allocation is included, minus funds transferred out of Title IV, Part A. ***NOTE:*** If all funds are transferred out of Title IV, Part A, non-public schools will not receive an equitable share of the funds through Title IV, Part A. The equitable services share will be taken from the program that funds were transferred into instead.
B2: Enter the administrative costs paid with Title IV, Part A funds. This amount must include public and non-public school administrative costs. ***NOTE:*** If the LEA is utilizing con admin, the amount entered here ***must*** match the amount contributed from Title IV, Part A displayed on the Allocations page.

B3: ePlan auto-calculates the total amount of Title IV, Part A funds available for equitable services. (The LEA allocation minus administrative costs for the public and non-public Title IV, Part A program.)

C. Per Pupil Rate:

C1: ePlan auto-calculates the per-pupil amount of Title IV, Part A funds available for every enrolled student.

D. Equitable Services:

D1: ePlan auto-calculates the Title IV, Part A funds that must be reserved for non-public/private school services.

E. FY20 Non-Public Carryover Amount: The LEA must calculate this amount and enter it. The amount entered must be the amount of FY20 Title I funds set-aside for equitable **services that will not be obligated by July 1, 2021**. LEAs must carry over these remaining funds and add them to the FY21 funds for equitable services.

F. Total Amount of Non-Public Instructional Funds (FY20 Carryover and FY21): This amount auto-calculates by adding the rows D and E. The amount displayed is the total amount of Title II funding available to provide instructional services and programs to participating non-public schools. ***NOTE:*** *LEAs must enter this amount on the <u>District Set-Aside</u> page on the Non-Public/Private School Instructional Funds line once the LEA completes the final expenditure report (FER) for FY20 and final allocation revisions are processed.*

Narrative Questions

- Describe the consultation process between the LEA and the non-public/private school(s). Include (1) important dates, (2) modes of communication, and (3) the information provided to non-public/private school representatives. (Upload affirmation of consultation(s) in Related Documents.) ***NOTE:*** *LEAs must upload the completed **Affirmation of Meaningful Private School Consultation Form** on the <u>Related Documents</u> page.*
- Describe the activities to be provided in support of participating non-public/private school students and/or teachers.

Equitable Services for Non-Public Schools Program Assurances

By checking the statement at the top of the <u>*Program Assurances*</u> page, the user affirms that they have read and understood all requirements and that the LEA will abide by the same.

Related Documents

Upload Affirmation of Meaningful Private School Consultation(s) on the attached template. Upload any additional supporting documents.

Non-Public/Equitable Services Checklist

- Save the page by clicking Save and Go to > Current Page, then click **Help for Current Page** in the sidebar for a checklist to determine if the application is ready for submission. If the answers to all the following questions are "yes" and/or "N/A," the application is ready for submission.

IDEA Requirements

In this section, LEAs must document the special education staff employed by the LEA, provide a breakdown of students by primary disability, and provide information regarding Free and Appropriate Public Education (FAPE) and the various options of services provided to students. Staff included in the _Personnel Details_ pages are staff members paid with IDEA, Part B funds(611); IDEA Preschool funds (619); and/or state and local funds. Staff titles/positions, head counts, and full-time equivalents (FTEs) must match the supporting IDEA, Part B (611); IDEA Preschool; and the general purpose special education budget LEAs must upload to _IDEA Shared Related Documents_ page.

IDEA Personnel Details—Systemwide Admin/Instruction & Support

- **Systemwide Administration:** Enter both a head count and an FTE for all systemwide administrative staff supported with IDEA, Part B funds (611); IDEA Preschool funds (619) funds; and general purpose special education funds. Staff members listed in this table are typically personnel working in the LEA's central office, providing administrative oversight of special education programs. The head counts, FTEs, and staff titles/positions must match the information provided in the IDEA, Part B (611); IDEA Preschool; and the general purpose special education budget narratives. The positions within this page are typically budgeted in account number 72220. Several widely-used position titles are prepopulated within this page, but "Other" rows may be added as needed to list all staff. If entering staff information in an "Other" line, provide a title for the position and ensure this title is used consistently throughout the entire application. Do not include instructional staff in this section, only administrative staff.
- **System-Wide Instruction & Support:** Enter both a head count and an FTE for all systemwide instruction and support staff who are located either in the central office or providing support to more than one school site on an irregular schedule. These staff members work across the LEA with multiple school sites as necessary, not as part of a planned assignment. The head counts, FTEs, and staff titles must match the information provided in the IDEA, Part B, and IDEA Preschool budget narrative descriptions or the general purpose special education budget. The positions within this page are budgeted in 71150 or 71200 if instructional staff are providing direct services to students with disabilities; or budgeted in 72120, 72130, 72215, 72220, if support staff are providing services, depending on the duties of the staff employed. All transportation personnel must be budgeted in 72710. Several widely used position titles are prepopulated within this page. Add "Other" rows as needed to list all staff. If entering staff information in an "Other" category, provide a title for the position, and use this title throughout the application. List all extended school year (ESY) personnel on this page.

IDEA Personnel Details—School-level (6–21) —Teachers & Ed Assistants

School names and LEA ID-school numbers are prepopulated from the school directory.
- Enter head counts and FTEs, by school, for school-level teachers and educational assistants providing special education services to students age 6–21. Staff information must be broken down and entered based on funding sources: IDEA, Part B (611) and general purpose special education funds.

The head counts, FTEs, and staff titles must match the information provided in the IDEA, Part B budget narrative descriptions and/or the general purpose special education budget uploaded to *IDEA Shared Related Documents*.

Staff members listed on this page must be budgeted in account number 71200 in the IDEA, Part B (611) or general purpose special education budget or 71150 in an alternative setting.

IDEA Personnel Details—School-Level (6–21): Other Positions (Nurses, Psychologists, etc.)

School names and LEA ID-school numbers are prepopulated from the school directory.
- Enter head counts and FTEs by school for the following personnel: speech pathologists, psychologists, nurses, and other related services personnel providing special education services to students age 6–21. If entering data in the "Other" column, specify the position title. Staff information must be broken down and entered based on funding sources: IDEA, Part B (611) and general purpose special education funds. The head counts, FTEs, and staff titles must match the information provided in the IDEA, Part B budget narrative descriptions and/or the general purpose special education budget uploaded to *IDEA Shared Related Documents*.

Staff members listed on this page are generally budgeted in account series 72220, 72215, and/or 72710 in the IDEA, Part B budget, or the general purpose special education budget depending on the duties of the staff employed. Other account series that could be used, in limited situations, include 72120, 72130, and 72215.

IDEA Personnel Details—School-Level (3–5): Teachers & Ed Assistants

School names and LEA ID-school numbers are prepopulated from the school directory.
- Enter head counts and FTEs by school for school-level teachers and educational assistants providing special education services to students age 3–5. Staff information must be broken down and entered based on funding sources: IDEA, Part B (611), IDEA Preschool (619), and general purpose special education funds. The head counts, FTEs, and staff titles must match the information provided in the IDEA, Part B budget and IDEA Preschool budget narrative descriptions, and/or the general purpose special education budget uploaded to *IDEA Shared Related Documents*.

Staff members listed on this page must be budgeted in account number 71200 in the IDEA, Part B, IDEA Preschool, and/or the general purpose special education budget.

IDEA Personnel Details—School-level (3–5): Other Positions (Nurses, Psychologists, etc.)

School names and LEA ID-school numbers are prepopulated from the school directory.
- Enter head counts and FTEs by school for the following personnel: speech pathologists, psychologists, nurses, and other related services personnel providing special education services to students age 3–5. If entering data in the "Other" columns, specify the position title. Staff information must be broken down and entered based on funding sources: IDEA, Part B (611), IDEA Preschool (619), and general purpose special education funds. The head counts, FTEs, and staff titles must match the information provided in the IDEA, Part B and IDEA Preschool budget narrative descriptions, and/or the general purpose special education budget uploaded to *IDEA Shared Related Documents*.

Staff members listed on this page are generally budgeted in account numbers 72220, 72215, and/or 72710 in the IDEA, Part B; IDEA Preschool, or general purpose special education budget depending on the duties of the staff employed. Other account series that could be used, in limited situations, include 72120, 72130, and 72215.

IDEA Shared Program Details

Table A - Children with Disabilities to Receive Free Appropriate Public Education Services from the School System: Disability categories are provided.

- Enter projected student counts into the row that corresponds to their primary disability. Student counts must be entered based on their age (3–5 and 6–21). This table represents an unduplicated count, so only count students once, except for column (4), see below.

A. Children With Disabilities To Receive Free Appropriate Public Education Services From The School System
1. Counts in this table should be an Unduplicated Count.
2. EOY Report may be used as a method of projecting numbers.

									Placed by Parents			
	(1) Within School System		(2) Contractual Agreement Full time placement only		(3) Total to Receive FAPE		(4) # Receiving Special Transportation+		(5) # Private School Students to be Placed by LEA for Receiving Services		(6a) # Private School Students to be Placed by Parents within system		(6b) # Of Private School Students to be Served by LEA This School Year	
	3-5	6-21	3-5	6-21	3-5	6-21	3-5	6-21	3-5	6-21	3-5	6-21	3-5	6-21
Autism					0	0								
Blind					0	0								

- ***(1) Within School System:*** Count students here who are receiving free and appropriate public education services within the public school system based on disability category.
- ***(2) Contractual Agreement Full Time Placement Only:*** Count students here who are receiving free and appropriate public education services through a full-time placement outside of the school system through a contracted agreement.
- ***(3) Total to Receive FAPE:*** This column is an auto-calculated field that adds student counts in columns 1 and 2 to determine the total student count.
- ***(4) # Receiving Special Transportation:*** Count students here who are receiving free and appropriate public education services who require special transportation. Count students counted in these columns (3–5 and 6–21) in one of the other columns signifying the type of services to be provided (within system, contracted/full-time placement, non-public/private school placed by LEA, non-public/private school placed by parents, and served). ***NOTE:*** *If student counts are provided in this column, a transportation budget must be included in one or more of the budgets for IDEA, Part B, IDEA Preschool, and/or the general purpose special education. These services must be included in each student's individualized education program (IEP). In some situations where the LEA is not charged for the service, a note must be provided detailing why services are not budgeted on the general purpose budget.*
- ***(5) # Private School Students to be Placed by LEA for Receiving Services:*** Count the number of students the LEA has placed into a non-public school to receive specialized services that are not available within the system. (A signed contract between the LEA and the legal guardian of the student being placed must be maintained by the LEA. This is required within 30 days of the start of the services.)
- ***(6a) # Private School Students to be Placed by Parents within system:*** Count the number of students identified through child-find who have been placed by parents into a non-public school within the system. This count also includes home-schooled students.
  NOTE: *LEAs may have numbers in the 6a columns (3-5 and 6-21) and not have any numbers entered in 6b.*
- ***(6b) # Private School Students to be Served by LEA This School Year:*** From *6a,* identify the number of students who receive services from the LEA. ***NOTE:*** *LEAs cannot have numbers in the 6b columns (3-5 and 6-21) unless there are numbers entered in the corresponding 6a columns. The numbers in 6b (3-5 and 6-21) cannot exceed the counts in the corresponding 6a columns.*
- ***Table B - Options to be Provided***: Enter student counts to reflect the primary and one secondary option, if applicable, of services for students with disabilities. The student counts within *Table B* are duplicated, as students are entered to show more than one service option. The total count for 3–5 and 6–21 in this

table cannot be less than the total count for the corresponding age groups in column 3 of *Table A* on this page. Do not enter "0" in columns with no students.

B. Options to be Provided

1. The counts in this table are a duplicated count and should reflect both primary and one secondary option of service.
2. It is recommended that the LEA pull Options of Service from a date when the LEA's enrollment was at its peak.
3. Do not place 0's in columns with no students.

	Option 1	Option 2	Option 3	Option 4	Option 5	Option 6++	Option 7	Option 8+++	Option 9	Option 10	Total+
3-5	16	113	1	7	8		10				155
6-21	521	416	150	186	230	1	136	98		7	1,745

+ The total for each age group must be equal to or greater than total for each corresponding age group in column 3 under Table A above.

++ For each option 6 student there is at least ½ FTE of an education assistant or interpreter position budgeted in general purpose funds.

+++ Since Option 8 includes 2 related services, students reported in Option 8 should not be reported in another Option.

For every student entered in the *Option 6* column, the LEA must budget at least one-half FTE for an educational assistant or an interpreter position in the general purpose special education budget.

Do not report students entered in the *Option 8* column under any other available option, because *Option 8* includes two related services.

IDEA Shared Related Documents

- Upload documentation in support of the *IDEA, Part B and IDEA Preschool* sections. Use provided templates to provide supporting information as necessary. The "Maintenance of Effort Exception" space is provided for LEAs seeking an exception for maintenance of effort (MOE) to upload to support the need for a Maintenance of Effort Exception.
- LEAs must complete and upload the provided excel document "General Purpose Special Education Budget". Information within the budget is used to determine if the LEA is in compliance with MOE eligibility requirements. If the LEA is not in compliance with MOE eligibility, the application cannot be approved.
- LEAs must complete the "GP Summary" sheet and confirm that the LEA has budgeted the minimum amount necessary to meet maintenance of effort (MOE) requirements for the fiscal year
  - o **Yes** means the projected expenses for the next year will meet MOE, either by total expenses and/or per-pupil expenses, including if the LEA used any of the exceptions to reduce MOE. LEAs must include an explanation in the *IDEA, Part B* section, on the *Non-Supplanting/Maintenance of Effort* page under question #7.
  - o **No** means the projected expenses for the next year will not meet MOE. LEAs must explain why the projected and actual expenses for next year will not meet MOE. LEAs must also include an explanation in the *IDEA, Part B* section, on the *Non-Supplanting/Maintenance of Effort* page under question #7.

LEAs must upload the State Special Education Expenditure Report (SSEER) by **Sept. 1**. The SSEER determines if the LEA has met MOE compliance. If the LEA is not in compliance with MOE requirements, the department will return the application not approved

IDEA Private School Details

The department determines the proportionate amount of IDEA funds that must be spent on services for parentally-placed students based on information that the LEA submits the December before the CFA opens via the *IDEA Private Schools Parentally Placed Reserve Information & Documents*. This information is uploaded into **TDOE Resources** > *ESSA/IDEA Non-Public/Private Schools Information & Documents* > *IDEA Private Schools*

Proportionate Amounts. Until final IDEA allocations are determined, LEAs must reserve the state-provided estimated amount of funds, if any, and complete this page and budget funds using those estimates from the department. If proportionate share amounts are revised, LEAs must submit the final amounts from the revised IDEA Private Schools Proportionate Amounts form with final budget revisions by Sept. 30, or after any change in IDEA, Part B and/or IDEA Preschool allocations.

- In part 1, indicate whether the LEA is required to reserve a portion of their IDEA funds (IDEA 611 funds[6-21] and/or IDEA 619 funds [3-5]) to provide services to parentally-placed non-public school students, including homeschooled students. All LEAs must check yes or no for both IDEA 611 funds (6-21) and IDEA 619 funds (3-5).
- In part 2, identify account number(s) with line item(s) where these expenditures are located within the IDEA 611and IDEA 619 budgets. Please do not include any monetary amounts in this table
- In part 3, indicate if the LEA will carry over any prior year non-public/private school proportionate share funds for use in the current year. Identify the estimated amount of carryover funds separately for both IDEA 611 funds (6-21) and IDEA 619 funds (3-5). All LEAs must check yes or no for both IDEA 611 funds (6-21) and IDEA 619 funds (3-5).

IDEA Requirements Checklist

Save the page by clicking **Save and Go to > Current Page**, then click **Help for Current Page** in the sidebar for a checklist to determine if the application is ready for submission. If the answers to all the following questions are "yes" and/or "N/A," the application is ready for submission.

IDEA, Part B

Budget

- Budget all funds awarded using the appropriate account number(s), line item(s), and budget tag(s).
- Provide a budget narrative description for every line item within the budget to explain and describe expenditures appropriately.

Budget narrative descriptions must include, if applicable:
- Full-time equivalents (FTEs) for all employees of the LEA to fund with IDEA B funds;
- Titles of positions (**not** names) funded, beside the corresponding FTE that matches the titles used throughout the *IDEA Requirements* section, general purpose special education budget, and other related documents uploaded in support of the CFA;
- Examples of equipment, materials, and supplies to fund;
- Specific professional development, the number and type of staff who participate (position titles, not employee names), and expenses to pay;
- A description of services for contracting staff or services;
- An indication of a stipend payment, if funds are paid to an existing LEA staff member for work beyond regular work hours – an explanation why the stipend is provided to the employee (purpose); and
- Labeled expenditures for non-public/private school proportionate shares to non-public school(s) and homeschooled students.

Budget Overview

No input is required by the LEA. A summary of the IDEA, Part B budgeted amounts is reported by line item and account number. This section is a resource to provide a different view of the budgeted amounts.

Equipment Purchases Requiring Prior Approval

Equipment having a useful life of more than one year, with a per-unit purchase price of $5,000 or more must be approved prior to purchase (2 CFR § 200.313). Identify any items purchased that meet these criteria on this page.
- If no purchases require prior approval, mark this page as "N/A."
- For each item that requires prior approval, provide the budget codes (account number and line item) under which it will be budgeted, the quantity to be purchased, a description of the item, the unit cost (must be $5,000 or more), and a justification for the purchase. (The LEA must indicate the **need** for the item. Why is the equipment necessary?) Justifications must be 500 characters or less.
- Add rows as needed by clicking the "Add Row" link.
- All items listed on this page must be in the IDEA, Part B budget, in the account number and budget line indicated.

Permissive Use of Funds

- ***A. Adjustment to Local Effort in Certain Fiscal Years:*** Indicate whether the LEA will adjust the amount of state and local funds spent for special education in the prior year to meet maintenance of effort requirements. LEAs may reduce the state and local effort by an amount that equals up to 50 percent of the LEA increase in IDEA funds **if** those funds were spent on allowable ESSA activities [34 CFR § 300.205(b)].***NOTE:*** *LEAs not meeting requirements in the state's Annual Performance Review (APR) are not permitted to adjust maintenance of effort figures*.
  - If the LEA chose "No" in part A of this page, select "N/A" at the top of the next page, "A. Adjustment to Local Effort."
  - If the LEA chose "Yes" on part A of this page, complete the information on the corresponding page of the IDEA, Part B application, "*A. Adjustment to Local Effort*." (See explanation under the *Adjustment to Local Effort* page of this document.)
- ***B. Permissive Use of IDEA funds for School-Wide Program:*** Indicate whether the LEA is exercising the option to consolidate funds in one or more Title I school-wide schools and is including IDEA funds in the consolidation.
  - If the LEA chose "No" in part B of this page, select "N/A" at the top of the page in the corresponding part of the IDEA, Part B application "B. School-Wide Program."
  - If the LEA chose "Yes" in part B of this page, complete the information on the corresponding page of the IDEA, Part B application, "*B. School-Wide Program*." (See the explanation under the *School-wide* page of this document.)
- ***C. Permissive Use of IDEA funds for Coordinated Early Intervening Services (Voluntary) or Comprehensive Coordinated Early Intervening Services (Mandatory):*** Indicate if the LEA is using IDEA funds to develop and implement Coordinated Early Intervening Services (CEIS) for K-12 students (voluntary) or Comprehensive Coordinated Early Intervening Services (CCEIS) for students ages 3-21 (mandatory). LEAs may voluntarily use up to 15 percent of the IDEA, Part B allocation for CEIS (34 CFR § 300.226) or may be mandated to use 15 percent of the IDEA, Part B allocation and IDEA, Part B, Section 619 allocation for CCEIS from the Division of Special Populations and Student Support. If the use of funds is mandated, funds must be used to provide supplemental supports to students with disabilities and non-disabled students ages 3-21, with a focus primarily on the issue surrounding why the LEA is disproportionate.
  - If the LEA chose "No" in either part C – Coordinated Early Intervening Services (CEIS) or part C Comprehensive Coordinated Early Intervening Services (CCEIS) of this page, select "N/A" at the top of the corresponding pages in the IDEA, Part B application, "*C. Coordinated Early Intervening Services*" or "C. Comprehensive Coordinated Early Intervening Services".
  - If the LEA chose "Yes" in either part C – Coordinated Early Intervening Services (CEIS) or part C Comprehensive Coordinated Early Intervening Services (CCEIS) of this page, complete the information in the corresponding page, "C. Coordinated Early Intervening Services" or "C. Comprehensive Coordinated Early Intervening Services". (See the explanation under *Coordinated Early Intervening Services* or *Comprehensive Coordinated Early Intervening Services* section of this document.)

A. Adjustment to Local Effort

- Select "N/A" if the LEA selected "No" in part A of the *Permissive Use of Funds* page of the *IDEA, Part B* section. *No other information is required on this page.*
- If the LEA selected "Yes" in part A of the *Permissive Use of Funds* page of the IDEA, Part B section, the information on this page must be completed.

Complete the table in Part A:

- Row 1: Enter the estimated or final IDEA, Part B allocation for the current year (once the final allocation has been uploaded into ePlan, the actual allocation must be used to assure the amounts are allowable);
- Row 2: Enter the final IDEA, Part B allocation for the prior year;
- Row 3: ePlan auto-calculates the amount of the increase in IDEA, Part B funds from the prior year by subtracting row 2 from row 1); ***NOTE:*** *If the difference is a negative amount, the LEA has **not** experienced an increase in IDEA, Part B funds and cannot adjust maintenance of effort (MOE).*
- Row 4: ePlan auto-calculates the amount the LEA will reduce MOE if it is less than the maximum amount as half of the value of Row 3.
- Row 5: If applicable, enter the amount of funds the LEA is using for CEIS.
- Row 6: ePlan auto-calculates the maximum amount available.
- Row 7: Enter the amount reduced if less than the maximum amount is available

In the Budget and Justifications area, explain how the amount of decreased general purpose special education funds from Part A will be spent in support of ESEA programs. (Once the general purpose special educations funds are decreased, the funds are no longer considered general purpose special education funds.)

- List the ESEA Programs under which funds will be used. Separate multiple program names with commas.
- List each expenditure in the table, including the account number, expenditure account name, FTE, and amount budgeted, and justification. Use the "Add Row" feature to provide information about additional expenditures. ***NOTE:*** *Do not use special education account codes when providing information on the use of funds. The account codes must be general education account codes because these funds are being used to support general education services that are allowable under one or more ESEA programs.*

B. School-Wide Program

- Select "N/A" if the LEA selected "No" in part B of the *School-Wide Program* page of the IDEA, Part B section.

If the LEA selected "Yes" in part B of the *School-Wide Program* page of the IDEA, Part B section, the information on this page **must** be completed.

School Name	A IDEA Allocation	B No. of SPED Students in LEA	C No. of SPED in School-Wide School	(A/B) x C = Amount for School-wide
🗑	$			$ 0.00
Add Row				
			Total:	$ 0.00

- Identify the schools that are consolidating IDEA, Part B funds with other federal, state, and/or local funds. For each school, identify the total LEA IDEA, Part B allocation, and the total number of students with disabilities in the LEA and the school. The maximum amount that may be consolidated in a school is auto-calculated and displayed for each school entered. To enter additional schools, click "Add Row."

C. Coordinated Early Intervening Services (CEIS)—Voluntary

- Select "N/A" if the LEA selected "No" in subsection C of the *Coordinated Early Intervening Services - Voluntary (CEIS)* page of the IDEA, Part B section.

If the LEA selected "Yes" in subsection C of the *Coordinated Early Intervening Services - Voluntary* page of the IDEA, Part B section, the information on this page **must** be completed.

LEAs that are voluntarily using IDEA, Part B funds for CEIS must calculate the maximum amount permitted. The use of funds for CEIS has a direct impact on the adjustments that LEAs may make to state and local special education expenditures and vice versa. See examples below:

A. Prior Year IDEA B Allocation	B. Current Year IDEA B Allocation	C. Increase from Prior Year (B-A)	D. Max Available for MOE Reduction (C x 50%)	E. Max Available for CEIS (B x 15%)
$900,000	$1,000,000	$100,000	$50,000	$150,000

- If the LEA chooses to set aside the maximum amount for CEIS ($150,000) it **cannot** reduce its MOE. (The amount of CEIS set-aside is more than the maximum allowable MOE reduction.)
- If the LEA chooses to set-aside only $50,000 for CEIS, it **cannot** reduce its MOE. (The amount of CEIS set-aside is equal to the maximum allowable MOE reduction.)
- If the LEA chooses to set-aside only $30,000 for CEIS, it **may** reduce its MOE by up to $20,000. (The CEIS set-aside is $20,000 less than the maximum allowable MOE reduction.)
- If the LEA chooses **not** to set-aside any funds for CEIS, it **may** reduce its MOE by up to $50,000. (The maximum allowable MOE reduction is available because no funds have been set-aside for CEIS.)
- If the LEA is voluntarily choosing to set aside IDEA, Part B funds for CEIS, all subsections must be answered.

1) Funds Available Calculation: This area calculates the amount of funds allowable to use. The LEA may elect to use up to 15 percent of the IDEA, Part B funds for CEIS. ***NOTE:*** *If the LEA voluntarily takes up to 15 percent, the funds must be spent from July 1–June 30; any remaining funds must be returned to IDEA for programming.*

2) Narrative for the Voluntary Use of Funds: How were the at-risk students identified? This narrative must be completed to explain the identification of at-risk students.

3) Projected Expenditures for Coordinated Early Intervening Services: This area must be completed by all LEAs using funds for CEIS to identify the expenditures in support of CEIS. General education account codes must be used, as these expenditures are supports to regular education students, not students with disabilities. Expenditures identified here **must** also be included in the IDEA, Part B budget under 99100-590 Transfers Out; place the letters CEIS in the block for "Optional Program Code."

Comprehensive Coordinated Early Intervening Services (CCEIS)—Mandatory

- Select "N/A" if the LEA selected "No" in area C of the *Comprehensive Coordinated Early Intervening Services – Mandatory (CCEIS)* page of the IDEA, Part B section.

If the LEA selected "Yes" in area C of the *Comprehensive Coordinated Early Intervening Services – Mandatory (CCEIS)* page of the IDEA, Part B section, the information on this page **must** be completed.

LEAs that must use IDEA, Part B funds and IDEA Preschool funds for CCEIS must answer all questions on this page and calculate the maximum amount required for CCEIS correctly.

1) Funds Available Calculation: The LEA must use 15 percent of the IDEA, Part B funds and IDEA Preschool funds (611 and 619) for CCEIS. ***NOTE:*** *If the LEA does not expend all funds required in this* area*, the remaining funds are carried forward into the following fiscal year.*

2) Assurance

3) Areas of Significant Disproportionality and Race/Ethnicity Groups

4) Narratives for Use of Funds: Complete these narratives to explain the disproportionality identified and how funds will be used to improve disproportionality.

5) Budgets: LEAs must use CCEIS funds to provide supplemental supports to students with disabilities and/or non-disabled students ages 3-21, with a focus on why the LEA is disproportionate [34 C.F.R. § 300.646(c) and (d)] ***NOTE:*** *Any funds used for CCEIS services to identify students with disabilities* **must** *be included in the IDEA budget(s) and must be identified within the appropriate narrative descriptions with the amount indicated. The total must agree with the amount indicated in question 1. The LEA must also have a method of identifying all CCEIS funds to document how the funds are budgeted and expended from IDEA. Any funds used for services to students* **not** *identified as eligible for special education must be budgeted with the general purpose budget, identified as CCEIS funds, and shown in the budget line items in Part 4. The amount budgeted must agree with funds indicated in Part 3* [34 C.F.R. § 300.646(d)(3)]

Projected expenditures for CCEIS funds associated with non-special education students: This area must be completed by all LEAs using funds for CCEIS to identify the expenditures in support of CCEIS. **General education account codes must be used**, as these expenditures are supports to regular education students, not students with disabilities. Expenditures identified here **must** also be included in the IDEA, Part B budget under ***99100-590 Transfers Out*** and IDEA, Part B, Section 619 budget under ***99100-590 Transfers Out***; place the letters CCEIS in the block for ***"Optional Program Code."***

Non-Supplanting/Maintenance of Effort

LEAs may not reduce the amount of local funds, or the combination of state and local funds spent for the education of students with disabilities—by the total amount expended; per-pupil expenditures; or by one of the exceptions allowed by Law—below the amount spent in the preceding fiscal year (or the subsequent year, based on subsequent year rule) [34 CFR § 300.203(b)(1)]. By maintaining the level of support, LEAs demonstrate Maintenance of Effort (MOE). There are two components to the LEA Maintenance of Effort (MOE)—eligibility and compliance.

MOE **eligibility** is determined when the IDEA, Part B application is submitted in the spring of each year. LEAs must meet the MOE requirements to receive IDEA, Part B funds each year. **Compliance** with MOE is determined after the State Special Education Expenditure Report (SSEER) is submitted in September. LEAs must meet both compliance requirements.

- Identify the method used in determining compliance with MOE requirements by selecting either "State/Local Funds" or "Local Funds Only."

Row		A	B	C	D
		2018-19	2019-20	* 2020-21 Select... ▾	2021-22
1	Actual amount expended for students with disabilities (SWD) served (State Special Education Expenditure Report)	* $	* $	* $	
2	Total unduplicated count of disabled students served by the school system (End of Year Report)	*	*	*	
3	Per pupil expenditures (Row 1 divided by Row 2)	* $ 0.00	* $ 0.00	* $ 0.00	
4	System's total enrollment (All Students)			*	
5	Percentage of Special Education Students (Row 2 divided by Row 4)			* 0.00 %	
6	Projected Expenditures (Total Expenditures General Purpose Funds)				* $

Based on the method selected, provide the following information:

- **Row 1**: Actual amounts expended for providing services to students with disabilities in the years specified. These amounts must match the amounts submitted in the respective SSEER and as approved in prior applications.
- **Row 2:** The total unduplicated count of students with disabilities served by the school system in each year specified. These numbers must match the reported student counts in the End of Year Reports (as provided in **TDOE Resources** for each LEA).
- **Row 4**: The total number of all students enrolled in school during the preceding school year (as indicated by the year given in the column designation).
- **Row 6:** Projected general purpose expenditures for special education in the application year. This amount **must** match the total special education expenditures in the general purpose special education budget that must be uploaded to _IDEA Shared Related Documents_ before submission. **_NOTE:_** _When submitting the original application for the upcoming fiscal year, select_ **_"Projected"_** _in the column C drop-down box. All data entered in this column is projected until final numbers are entered as part of the final budget revision. When the SSEER is uploaded into ePlan, the LEA must change the dropdown to_ **_"Actual"_** _and update the data for the fiscal year._
- If the amount entered in row 6 is less than the amount entered in row 1, column B (the latest year for which the LEA has documented expenditures), provide an explanation in item 7. The only acceptable explanations are those allowable exceptions permitted in IDEA listed in item 9. The LEA can project if these would be applicable as reasons to reduce MOE for the upcoming school year.

<div align="center">

Do not complete the remaining items (8 & 9) until <u>after</u> the SSEER is submitted.

</div>

(**The SSEER is due by Sept. 1**.) This part of the page is related to ensuring the LEA has met the compliance requirement of MOE for the prior year.

Upload the **completed** SSEER to _IDEA Shared Related Documents_ then change the selection in row 1 to "Actual," and enter actual information for the prior year (expenditures and student counts).

Determine the compliance requirement for MOE by comparing the amount in row 1, column C to row 1, column B.

Based on actual information, respond to items 8 and 9 to indicate the method used to meet MOE requirements and, if necessary, the exceptions needed to meet the requirements, if any. The allowable exceptions permitted in IDEA are identified below:

- Voluntary departure or departure for just cause of special education or related services personnel;
- A decrease in the enrollment of students with disabilities;
- Termination of the LEA's obligation to provide an exceptionally high-cost special education program to student(s) because the student(s) is leaving the LEA's jurisdiction, aging out of the LEA's program, or no longer in need of the program.
- Termination of costly expenditures for long term purchases; or
- Assumption of costs by the high-cost fund operated by the SEA.

If the LEA uses any of the "Other allowable exceptions" in item 9, a maintenance of effort exception letter must be uploaded to _IDEA Shared Related Documents_.

IDEA, Part B Checklist

Save the page by clicking **Save and Go to > Current Page**, then click **Help for Current Page** in the sidebar for a checklist to determine if the application is ready for submission. If the answers to all the following questions are "yes" and/or "N/A," the application is ready for submission.

IDEA Preschool

Budget

- Budget all funds awarded using the appropriate account number(s), line item(s), and budget tag(s).
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures.

Budget narratives must include, if applicable:
- FTEs for all employees of the LEA funded with IDEA Preschool funds;
- Titles of positions—not staff names—funded, beside the corresponding FTE that matches the titles used throughout the IDEA Requirements section, general purpose special education budget, and other related documents uploaded in support of the CFA;
- Examples of equipment, materials, and supplies to be funded;
- A description of services to be purchased if contracting staff or services;
- An indication of a stipend payment, if funds are paid to an existing LEA staff member for work beyond regular work hours; and
- Labeled expenditures for equitable services to non-public schools.

Budget Overview

No input is required by the LEA. A summary of the IDEA Preschool budgeted amounts is reported by line item and account number. This section is a resource to provide a different view of the budgeted amounts.

Equipment Purchases Requiring Prior Approval

According to 2 CFR 200.302(b)(4), LEAs must establish and maintain effective internal control. The department added the guideline that equipment having a useful life of more than one year, with a per-unit purchase price of $5,000 or more must be approved prior to purchase. Any items the LEA plans to purchase that meet these criteria must be identified on this page.

- For each item, provide the account code and line item, the quantity to be purchased, a description of the item, the unit cost (must be $5,000 or more), and a justification for the purchase. Justifications must be 500 characters or less.
- Add rows as needed by clicking the "Add Row" link.

All items listed on this page must be in the *IDEA, Part B, Section 619* budget, in the account and budget line indicated. If no purchases requiring prior approval will be made, mark this page as "N/A."

Permissive Use of Funds

- ***Adjustment to Local Effort in Certain Fiscal Years:*** Indicate whether the LEA will make an adjustment to the amount of state and local funds spent for special education in the prior year to meet maintenance of effort requirements. LEAs may reduce the state and local effort by an amount that equals up to 50

percent of the LEA increase in IDEA funds **if** those funds were spent on allowable ESSA activities. ***NOTE: LEAs not meeting requirements in the State's APR are not permitted to adjust maintenance of effort figures.***
  - o If the LEA chose "No" in area A of this page, select "N/A" at the top of the page in the corresponding area of the IDEA, Part B page, "A. Adjustment to Local Effort."
  - o If the LEA chose "Yes" in area A of this page, complete the information on the corresponding page of the IDEA, Part B section, "A. Adjustment to Local Effort." (See explanation under the *Adjustment to Local Effort* page of this document.)
- **Permissive Use of IDEA funds for School-Wide Program:** Indicate whether the LEA is exercising the option to consolidate funds in one or more Title I school-wide schools and is including IDEA funds in the consolidation.
  - o If the LEA chose "No" in area B of this page, select "N/A" at the top of the page in the corresponding area of the IDEA, Part B application "B. School-Wide Program."
  - o If the LEA chose "Yes" in area B of this page, complete the information in the corresponding area of the IDEA, Part B application, "B. School-Wide Program." (See the explanation under the *School-wide* page of this document.)
- **Permissive Use of IDEA funds for Coordinated Early Intervening Services (Voluntary):** Indicate if the LEA is using IDEA funds to develop and implement Coordinated Early Intervening Services (CEIS) for K-12 students (voluntary). LEAs may *voluntarily* use up to 15 percent of the IDEA, Part B, Section 619 allocation for CEIS. (Comprehensive Coordinated Early Intervening Services – Mandatory [CCEIS] is only located in the IDEA, Part B sections of ePlan.)
  - o If the LEA chose "No" in area C – Coordinated Early Intervening Services - Voluntary - (CEIS) on this page, select "N/A" at the top of the corresponding page in the IDEA, Part B, Section 619 application, "C. Coordinated Early Intervening Services".
  - o If the LEA selects "Yes" in area C – Coordinated Early Intervening Services – Voluntary - (CEIS) on this page, complete the information in the corresponding area of the IDEA, Part B, Section 619 application, "C. Coordinated Early Intervening Services". (See the explanation under *Coordinated Early Intervening Services or Comprehensive Coordinated Early Intervening Services* page of this document.)

A. Adjustment to Local Effort

- Select "N/A" if the LEA selected "No" in area A of the *Permissive Use of Funds* page of the IDEA, Part B, Section 619 application.
- If the LEA selected "Yes" in area A of the *Permissive Use of Funds* page of the IDEA, Part B, Section 619 application, the information on this page **must** be completed.
- Enter the following information in area A:
  - o The estimated or final IDEA, Part B, Section 619 allocation for the current year (once the final allocation has been uploaded into ePlan, the actual allocation must be used to assure the amounts are allowable);
  - o The final IDEA, Part B, Section 619 allocation for the prior year;
  - o The amount of the increase in IDEA, Part B, Section 619 funds from the prior year (subtract line 2 from line 1) ***NOTE: If the difference is a negative amount, the LEA has not experienced an increase in IDEA, Part B, Section 619 funds and cannot adjust maintenance of effort (MOE)***; and
  - o the amount the LEA will reduce MOE if it is less than the maximum amount that is auto-calculated and appears on line 4 of this page.
- Describe how the amount of decreased general purpose special education funds entered from the previous step will be spent in support of ESEA programs. (Once the general purpose special educations funds are decreased, the funds are no longer considered general purpose special education funds.) If more than one ESEA program is to be supported with these funds, list all programs in the text box titled

"Give the ESEA Program under which funds will be used," and then list each expenditure in the table below it. ***NOTE:*** *Do not use special education account codes when providing information on the use of funds. The account codes must be general education account codes because these funds are used to support general education services that are allowable under one or more ESEA programs.*

B. School-Wide Program

- Select "N/A" if the LEA selected "No" in area B of the *School-Wide Program* page of the IDEA, Part B, Section 619 application.
- If the LEA selected "Yes" in area B of the *School-Wide Program* page of the IDEA, Part B, Section 619 application, the information on this page **must** be completed.
  o Identify the schools that are consolidating IDEA, Part B, Section 619 funds with other federal, state, and/or local funds, along with the total LEA IDEA, Part B, Section 619 allocation, and the total number of students with disabilities in the LEA and the school. The maximum amount that may be consolidated in a school is auto-calculated and displayed for each school entered. To enter additional schools, click "Add Row."

C. Coordinated Early Intervening Services

- Select "N/A" if the LEA selected "No" in area C of the *Coordinated Early Intervening Services – Voluntary* page of the IDEA, Part B, Section 619 application.

If the LEA selected "Yes" in area C of the *Coordinated Early Intervening Services - Voluntary* page of the IDEA, Part B, Section 619 application, the information on this page **must** be completed.

LEAs that are required to or opt to use IDEA, Part B, Section 619 funds for CEIS must ensure that the maximum amount permitted for CEIS is calculated correctly. The use of funds for CEIS has a direct impact on the adjustments made to state and local special education expenditures and vice versa. See below:

A. Prior Year IDEA B Allocation	B. Current Year IDEA B Allocation	C. Increase from Prior Year (B-A)	D. Max Available for MOE Reduction (C x 50%)	E. Max Available for CEIS (B x 15%)
$900,000	$1,000,000	$100,000	$50,000	$150,000

- If the LEA chose to set aside the maximum amount for CEIS ($150,000) it **cannot** reduce its MOE. (The amount of CEIS set-aside is more than the maximum allowable MOE reduction.)
- If the LEA chose to set-aside only $50,000 for CEIS, it **cannot** reduce its MOE. (The amount of CEIS set-aside is equal to the maximum allowable MOE reduction.)
- If the LEA chose to set-aside only $30,000 for CEIS, it **may** reduce its MOE by up to $20,000. (The CEIS set-aside is $20,000 less than the maximum allowable MOE reduction.)
- If the LEA chose **not** to set-aside any funds for CEIS, it **may** reduce its MOE by up to $50,000. (The maximum allowable MOE reduction is available because no funds have been set-aside for CEIS.)
  o If the LEA is required to set aside IDEA, Part B, Section 619 funds for CCEIS, complete the pages in the IDEA, Part B program.
- If the LEA is voluntarily choosing to set aside IDEA, Part B, Section 619 funds for CEIS, all areas must be answered.

Funds Available Calculation*:* This area is used to calculate the funds allowable. The LEA may elect to use up to 15 percent of the IDEA, Part B, Section 619 funds for CEIS. ***NOTE:*** *If the LEA voluntarily takes up to 15*

percent*, the funds must be spent from July 1 – June 30. Any remaining funds must be returned to IDEA for programming.*[34 CFR § 300.226]

Narrative for the Voluntary Use of Funds*: How were the at-risk students identified?* This narrative must be completed to explain the identification of at-risk students.

Projected Expenditures for Coordinated Early Intervening Services*:* This area must be completed by all LEAs using funds for CEIS to identify the expenditures in support of CEIS. **<u>General education account codes must be used</u>**, as these expenditures are supports to regular education students, not students with disabilities. Expenditures identified here **must** also be included in the IDEA, Part B, Section 619 budget under ***99100-590 Transfers Out***; place the letters CEIS in the block for ***"Optional Program Code."***

IDEA Preschool Checklist

Save the page by clicking **Save and Go to > Current Page**, then click **Help for Current Page** in the sidebar for a checklist to determine if the application is ready for submission. If the answers to all the following questions are "yes" and/or "N/A," the application is ready for submission

School-Wide Pool

Creating a School-Wide Pool

- To create the School-Wide Pool, checks the box "include in School-Wide Pool" on the Title I, Part A *PPA List* page.
- On the Allocation page, designate the amounts from each grant add to the School-Wide Pool. The Title I, Part A allocation is prepopulated from the *PPA List* page; Enter other amounts manually.
- ePlan allows for the grant/fund contributions to be entered on the school allocations page by school and percentages are calculated automatically for each grant program.
- The percentages calculated from the allocations page are used for reimbursements in ePlan. If more than one school participates, a line for each school is created.
- Funds combined within the School-Wide Pool are removed from the LEA's grant allocations.
- Funds are combined into one budget for the School-Wide Pool, similar to the Consolidation Administration Pool, funds are budgeted just as other grant funds are budgeted, with all possible line items available.

Budget

- Budget all funds awarded (minus funds contributed to con admin) using the appropriate function, object code(s), and budget tag(s).
- Provide a budget narrative for every line item within the budget to appropriately explain and describe expenditures.
- Budget narratives **must** include, if applicable:
  - FTEs for all employees of the LEA to be funded with School-Wide Pool funds;
  - Titles of positions—**not** staff names—to be funded, beside the corresponding FTE that matches the titles used throughout the application;
  - Examples of equipment, materials, and supplies to be funded; be as specific as possible on major purchases. For example, if purchasing laptops, please indicate the number of laptops and the approximate cost of each laptop.
  - Specific professional development to be supported, the number and type of staff who will participate (position titles, not employee names), and expenses to be paid
  - Description of services to be purchased if contracting staff or services;
  - Indication of a stipend payment, if funds are being paid to an existing LEA staff member for work beyond regular work hours.

Budget Overview

No input is required by the LEA. A summary of the School-Wide Pool budgeted amounts is reported by line item and account number. This is a resource to provide a different view of the budgeted amounts.

Budget Overview Plus/Minus

No input is required by the LEA. A summary of prior approved budgeted amounts is reported by line item and account number with revision amounts displayed in red text. This resource provides a different view of the budgeted amounts and changes made within the current revision.

Program Details

- Provide a description, by school, of the activities and initiatives to be supported with school-wide pool funds. (Funds must be used in support of the Title I School-Wide plan.)
- Provide the head counts and FTE by school for all positions to be supported with School-Wide Pool funds. Use the "Add Row" link to create additional rows for additional positions and schools. Each school may have more than one row.

Related Documents

Upload the following documentation in support of the School-Wide Pool application.
- Intent to Participate Document (required)

Important Reminders

No administrative activities can be included in the School-Wide Pool budget, but school-level staff may be funded in each school with pool funds.

Schoolwide Pool Checklist

Save the page by clicking **Save and Go to > Current Page**, then click **Help for Current Page** in the sidebar for a checklist to determine if the application is ready for submission. If the answers to all the following questions are "yes" and/or "N/A," the application is ready for submission.

Assurances

ESEA Assurances

LEAs must review all ESEA program assurances thoroughly. All items specified are requirements of ESEA legislation or regulation. By checking the statement at the top of the page, the user affirms that they have read and understood all requirements, and the LEA will abide by the same.

IDEA Assurances

LEAs must review all IDEA program assurances thoroughly. All items specified are requirements of IDEA legislation or regulation. By checking the statement at the top of the page, the user affirms that they have read and understood all requirements, and the LEA will abide by the same.

OCR Assurances

LEAs must review all OCR assurances thoroughly. All items specified are regulations applicable under the Office of Civil Rights. By checking the statement at the top of the page the user affirms that they have read and understood all requirements, and the LEA will abide by the same.

Fiscal OMB A-133 Assurances

LEAs must review all Fiscal OMB A-133 assurances thoroughly. All items specified are regulations applicable for OMB Circular A-133. By checking the statement at the top of the page the user affirms that they have read and understood all requirements, and the LEA will abide by the same.

Fiscal OMB 2 CFA 1.100 Assurances

LEAs must review all Fiscal OMB 2 CFR 1.100 assurances thoroughly. All items specified are regulations applicable for OMB Circular A-133. By checking the statement at the top of the page, the user affirms that they have read and understood all requirements, and the LEA will abide by the same.

FERPA Assurances

LEAs must review all Family Educational Rights and Privacy Act (FERPA) assurances thoroughly. All items specified are regulations applicable for 20 U.S.C. §1232g; 34 CFR Part 99. By checking the statement at the top of the page, the user affirms that they have read and understood all requirements, and the LEA will abide by the same.